



## RESEARCHER PROFILE

This procedure is about creating and updating Researcher Profiles in the eSRA System.

- A. Who Needs a Profile?
  1. INFORMATION ONLY: When are Researcher Profiles Required?
- B. Access to Researcher Profiles
  1. INFORMATION ONLY: Scientific Divisions
  2. INFORMATION ONLY: OSPIP Contracts Officers
- C. Researcher Profile Workspace
  1. User's Home Page
  2. INFORMATION ONLY: Researcher Profile Workspace
- D. Create a Researcher Profile
  1. Confirm Researcher Profile does not already exist
  2. Start a new Researcher Profile
  3. Education
  4. Contact Information and Attachments
  5. OPTIONAL: Positions and Honors
  6. Memberships & Publications - Sponsor User IDs
  7. OPTIONAL: Interested Areas of Research
- E. Edit a Researcher Profile
  1. Lookup the Researcher
  2. Edit the Profile
  3. "Jump to" section to edit
  4. Finish Editing

Troubleshooting

### Researcher Profile – General Information

- The numbers in the written instructions will point you to the location on the related screen-print in the instructions.
- The front page can be used for reference.
- These icons call out special additional information.

Caution Warning	Serious Warning	Notes	Tips	Important

**A. Who Needs a Profile?**

A Researcher Profile is not required to use the eSRA System.

**Information Only**

1.	When are Researcher Profiles Required?
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Note: Researcher Profiles contain information required for a proposal such as the profile information that goes into the Person Profile section of the Grants.gov application or key personnel on a PHS 398 application.

- PI's Research Profile is required on all applications, regardless of the sponsor
- LBNL Multiple PI's Researcher Profile is required on NIH proposals
- LBNL Key Personnel on Grants.gov and NIH proposals
- LBNL Other Significant Contributors on NIH proposal
- Anyone from LBNL that required a "Person Profile" on a Grants.gov application
- OSPIP Contracts Officer – for all OSPIP Contracts Officers

**B. Access to Researcher Profiles**

The permissions to create or edit Researcher Profiles is role-based.

**Information Only**

1.	<p>In the scientific divisions:                  The PI can create and edit his or her own profile only.                  The Resource Analyst can create and edit profiles for anyone except the OSPIP Contracts Officer.</p>
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Note: The Resource Analyst does not need a Researcher Profile.

2.	OSPIP Contracts Officers can create and edit their own profile
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## C. Researcher Profile Workspace

1. After logging into eSRA, you should be in your home personal workspace. If not, or if you are planning to create or edit a Researcher Profile after taking other actions in eSRA, go to your home page by clicking "My Home" in the upper right corner.
  - 1a. Confirm your active role is correct.
  - 1b. Some people have more than one role. If your role is not correct to create or edit the Researcher Profile, highlight the role you want to use and your role will be changed.
  - 1c. Click "Researcher Profile" on the menu bar to go to the Researcher Profile Workspace.

The screenshot shows the eSRA Proposal System interface. At the top, there is a dark blue header with the Lawrence Berkeley National Laboratory logo and the text "eSRA Proposal System". To the right of the header, the user's name "Cynthia Sylvester" is displayed, along with a "My Home" link circled in red. Below the header, a navigation bar contains "Grants" and "Researcher Profile", with "Researcher Profile" circled in red. The main content area is titled "Page for Cynthia L Sylvester" and includes a "My Roles" sidebar with "Resource Analyst" highlighted. A table of proposals is visible at the bottom.

ID	Name	SmartForm	State	Due Date	Principal Investigator	Date Modified
FP00000168	PHG Copy of FP158	[Edit]	Preparation	10/5/2012	Williams	3/15/2011 3:50 PM
FP00000213	UAT4 Scenario 5B	[Edit]	Preparation	10/5/2012	Drapertest	4/18/2011 3:59 PM
FP00000225	PHG on testing Scenario 5	[Edit]	Preparation	10/5/2012	Wilsonstest	4/18/2011 4:49 PM

Information Only

2. Researcher Profile Workspace

- 2a. This tab shows the Researcher Profiles that are editable by the RA (or PI, if your role is PI).
- 2b. This is the list of Researcher Profiles already created.



Note: You will not be able to create a new Researcher Profile for a person that already has a Researcher Profile. [See section E of these instructions for the step-by-step process to edit an existing Researcher Profile.]

- 2c. These are the Researcher Profile “components” or actions that can be taken from the Researcher Profile Workspace. [See section D of these instructions for the step-by-step process to create a new Researcher Profile.]

**2a**

ID	Name	Date Modified	Owner	State
RP0000274	Williams, Paul T's Profile	10/25/2011 4:33 PM	NoelTest, SueTest	Active
RP0000280	Han, Bong-Gyoon's Profile	10/25/2011 4:31 PM	Sylvester, Cynthia L	Active
RP0000278	Adams, Paul D's Profile	10/5/2011 5:01 PM	Sylvester, Cynthia L	Active
RP0000192	Rebecca J Abergel's Profile	10/5/2011 4:59 PM	Abergel, Rebecca J J	Active
RP0000277	Serrano, Elma L's Profile	6/2/2011 10:21 AM	Blue, Stacey	Active
RP0000276	Bowen, Benjamin Paul's Profile	6/1/2011 4:07 PM	Omoto, Karen L L	Active
RP0000275	Northen, Trent R's Profile	6/1/2011 4:03 PM	Omoto, Karen L L	Active
RP0000203	Abby F Dernburg's Profile	6/1/2011 10:34 AM	Test, PhyllisRA	Active
RP0000210	Karen Dickinson-Mazzei's Profile	6/1/2011 10:33 AM	Abergel, Rebecca J J	Active
RP0000202	Priscilla K Cooper's Profile	5/11/2011 4:52 PM	Test, PhyllisRA	Active

## D. Create a Researcher Profile

### 1. Confirm Researcher Profile does not already exist



You will not be able to create a 2<sup>nd</sup> Researcher Profile for any individual.

- 1a. Set filter by field to "Name"
- 1b. Start to type the last name of the researcher you are looking for.
- 1c. Click "Go" to find that sub-set of profiles that match your selection.

**1a** Filter by **Name**

**1b** [Search Input Field]

**1c** [Go Button]

ID	Name	Date Modified	Owner	State
RP00000274	Williams, Paul T's Profile	10/25/2011 4:33 PM	Noeltest, Suetest	Active
RP00000280	Han, Bong-Gyoon's Profile	10/25/2011 4:31 PM	Sylvester , Cynthia L	Active
RP00000278	Adams, Paul D's Profile	10/5/2011 5:01 PM	Sylvester , Cynthia L	Active
RP00000192	Rebecca J Abergel's Profile	10/5/2011 4:59 PM	Abergel, Rebecca J J	Active
RP00000277	Serrano, Elma L's Profile	6/2/2011 10:21 AM	Blue , Stacey	Active
RP00000276	Bowen, Benjamin Paul's Profile	6/1/2011 4:07 PM	Omoto, Karen L L	Active
RP00000275	Northen, Trent R's Profile	6/1/2011 4:03 PM	Omoto, Karen L L	Active
RP00000203	Abby F Dernburg's Profile	6/1/2011 10:34 AM	Test, PhyllisRA	Active
RP00000210	Karen Dickinson-Mazzei's Profile	6/1/2011 10:33 AM	Abergel, Rebecca J J	Active
RP00000202	Priscilla K Cooper's Profile	5/11/2011 4:52 PM	Test, PhyllisRA	Active



If you find the person already has a Researcher Profile, skip to Section "E" of these instructions for the Step-by-Step process to edit a Researcher Profile.

2. Start a new Researcher Profile

2a. Click on "Create Researcher Profile" to start a new Researcher Profile.

The screenshot shows the 'Researcher Profile' page in the eSRA Proposal System. A sidebar on the left contains a 'Create Researcher Profile' button, which is circled in red. The main content area features a table of existing profiles with columns for ID, Name, Date Modified, Owner, and State. The table lists 12 profiles, including 'Williams, Paul T's Profile' and 'Han, Bong-Gyoon's Profile'.

ID	Name	Date Modified	Owner	State
RP00000274	Williams, Paul T's Profile	10/25/2011 4:33 PM	Noeltest, Suetest	Active
RP00000280	Han, Bong-Gyoon's Profile	10/25/2011 4:31 PM	Sylvester, Cynthia L	Active
RP00000278	Adams, Paul D's Profile	10/5/2011 5:01 PM	Sylvester, Cynthia L	Active
RP00000192	Rebecca J Abergel's Profile	10/5/2011 4:59 PM	Abergel, Rebecca J J	Active
RP00000277	Serrano, Elma L's Profile	6/2/2011 10:21 AM	Blue, Stacey	Active
RP00000276	Bowen, Benjamin Paul's Profile	6/1/2011 4:07 PM	Omoto, Karen L L	Active
RP00000275	Northen, Trent R's Profile	6/1/2011 4:03 PM	Omoto, Karen L L	Active
RP00000203	Abby F Demburg's Profile	6/1/2011 10:34 AM	Test, PhyllisRA	Active
RP00000210	Karen Dickinson-Mazzei's Profile	6/1/2011 10:33 AM	Abergel, Rebecca J J	Active
RP00000202	Priscilla K Cooper's Profile	5/11/2011 4:52 PM	Test, PhyllisRA	Active

2b. Start typing the last name of the LBNL researcher and a list will appear. Keep typing until you find the person you are looking for.



Use the "down arrow" (and "up arrow") to highlight the person you want, then "Enter" to select the person. (You may also use your mouse to make your selection.)

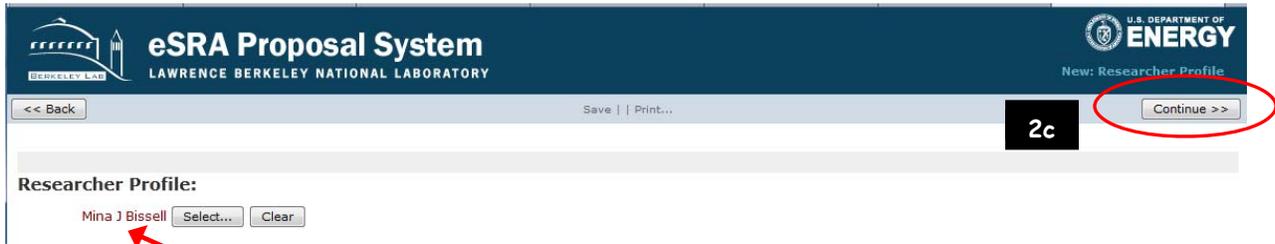
The screenshot shows the search interface for creating a researcher profile. The search input field and the 'Select...' button are circled in red. A black box labeled 'Alternate 2b' is positioned over the 'Select...' button.

Alternate 2b. Use the "Select" button to search by scrolling through the list of researchers, or to search by division or department. As above, Start typing the first letters of the Division or Department and a list will appear. Keep typing until you find the department or division you are looking for.



If you cannot locate the researcher after trying both search methods, contact [eSRAHelp@lbl.gov](mailto:eSRAHelp@lbl.gov) for assistance.

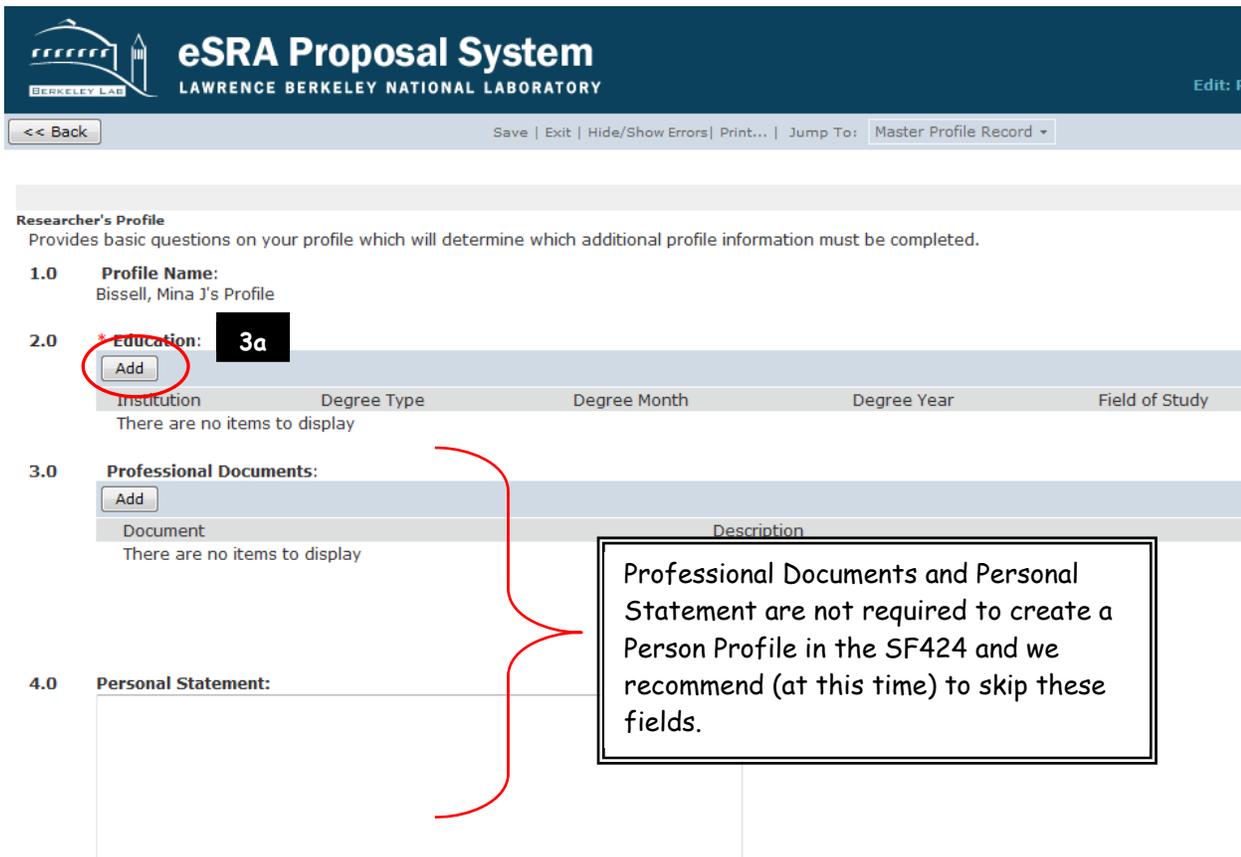
2c. Click "Continue" to save and move into the details of the Researcher Profile.



Although the name appears as a hyper-link. Do not click on the researcher's name to continue.

3. Education

3a. Click on "Add" to enter educational information for the researcher.





Only the highest degree is needed here. Enter the information for the highest degree the researcher has obtained.

- 3b. Enter the required information for each field.
- 3c. Click "OK" when complete.

**Edit Education**

\* **Institution:**

\* **Degree Type:**

\* **Degree Month:**   
*(format: mm)*

\* **Degree Year:**   
*(format: yy)*

\* **Field of Study:**

OK
OK and Add Another
Cancel

- 3d. The information will be displayed on the main page of the Researcher's Profile.
- 3e. Click "Continue" to save and continue to the next View.

**eSRA Proposal System**  
LAWRENCE BERKELEY NATIONAL LABORATORY

U.S. DEPARTMENT OF ENERGY  
Edit: Researcher Profile - RP00000281

<< Back
Save | Exit | Hide/Show Errors | Print... | Jump To: Master Profile Record
Continue >>

**Researcher's Profile**  
Provides basic questions on your profile which will determine which additional profile information must be completed.

**1.0 Profile Name:**  
Bissell, Mina J's Profile

**2.0 Education:**

Add	Institution	Degree Type	Degree Month	Degree Year	Field of Study	Delete
Update	Harvard University Medical School	PHD	06	69	Microbiology and Molecular Genetics	Delete

**3.0 Professional Documents:**

Add	Document	Description
There are no items to display		

**4.0 Personal Statement:**

Enter the educational listings that would appear on a biosketch.

This is a location to store professional documents to make them easily available for current or future proposals.

Use this box if eSRA will be used to create the NIH biosketch.

4. Contact Information and Attachments



Note: Information from each person's HRIS file is populated into these fields upon creation of the Researcher Profile. You need to confirm the pre-populated information is correct and enter additional required information.

- 4a. Specify any honorific, such as "Dr." You can start to type and hit "Enter" rather than using your mouse and the drop-down menu.

Contact Information & Attachments

1.0 Honorific  **4a**

\* First Name:

Middle Name:

\* Last Name:

Suffix:

\* Title:

\* Employee ID:

"Suffix" refers to things like "Jr." or "Sr." that are part of a person's name.

- 4b. Use the public title (such as the one the PI uses on their biosketch) not their personnel title)

Contact Information & Attachments

1.0 Honorific  **4b**

\* First Name:

Middle Name:

\* Last Name:

Suffix:

\* Title:

\* Employee ID:

4c. Enter the Lab email.



4d. Confirm the correct spelling of "Cyclotron" – apparently this is a common error in the HRIS database.



4e. Add the last 4 digits of the zip code. Federal proposals require the 9-digit zip code; but the HRIS system only records the five-digit zip code.

4f. Biosketches, Current & Pending, and CVs can be stored here, but they will not be uploaded in any of the proposals at this time. It is a decision for the division to make, if this is the correct location to store various iterations of these documents.

4g. Click "Continue" to save and move to the next View.

2.0

\* **Phone Business:**

**Phone Mobile:**

**Phone Fax:**

\* **Preferred Email:**  **4c**

3.0

\* **Street 1:**  **4d**

**Street 2:**

**Street 3:**

\* **City:**

\* **State:**  ▼

\* **Zip Code:**  **4e**

\* **Country:**  ▼

4.0

**NIH Biosketch:**

**Current And Pending Support:**

**CV:**

**4f**

5.0

**Department:** Cancer & DNA Damage Responses

**Division:** Life Sciences

**Organization:** Lawrence Berkeley National Laboratory



Section 5.0 is for information only.

**4g**

5. OPTIONAL: Positions and Honors

Positions and Honors

1.0 Positions:

Position	Years in Position
There are no items to display	

2.0 Honors:

Honor	Year Received
There are no items to display	

Positions and Honors are not required to create a Person Profile in the SF424 and we recommend (at this time) to skip these fields.

Click "Continue" to move to the next View.

6. Memberships & Publications – Sponsor User IDs



Sponsor User Names are not required to complete a Researcher Profile; but might be required for a specific sponsor to complete their application.

Memberships and Publications

1.0 Professional Memberships:

Name	Description
There are no items to display	

Professional Memberships are not required to create a Person Profile in the SF424 and we recommend (at this time) to skip these fields.

2.0 eRA User Name:  **6a**

3.0 DOD CDMRP User Name:  **6b**

4.0 NSPIRES User Name:  **6c**

5.0 PubMed User Name:  **6d**

6.0 Publications:

Name
There are no items to display

Publications and Therapeutic Areas are not required to create a Person Profile in the SF424 and we recommend (at this time) to skip these fields.

7.0 Therapeutic Areas:

ID
There are no items to display



Enter the sponsor User Names, if known at the time the Research Profile is created, even if the User Name is not required for this specific proposal to avoid having to edit the Research Profile later.

- 6a. The eSRA User Name is required for the PI and Multiple PI on any NIH proposal; and for all Postdocs on NIH non-competing continuations.
- 6b. The DOD CDMRP User Name is required for the PI and Partnering PI on DOD CDMRP proposals.
- 6c. The NSPIRES User Name is required for the PI and all Significant Participants on a NASA Proposal.
- 6d. The PubMed User Name is not required for any proposal; but might be used by administrative assistants to submit publications on behalf of the PI.

Click "Continue" to save and move to the next View.

7. OPTIONAL: Interested Areas of Research



The eSRA system has the ability to automatically search for funding opportunities in the PIs field of interest and place those opportunities in a “Funding Opportunities” tab in their personal workspace.

If you would like to take advantage of this option; please contact [eSRAHelp@lbl.gov](mailto:eSRAHelp@lbl.gov) for more information and to activate this service.



Click “Finish” to save and complete the Researcher Profile.

## E. Edit a Researcher Profile

### 1. Lookup the Researcher

- 1a. Set filter by field to "Name"
- 1b. Start to type the last name of the researcher you are looking for.
- 1c. Click "Go" to find that sub-set of profiles that match your selection.

The screenshot shows the 'eSRA Proposal System' interface. The 'Researcher Profile' section is active. The 'Filter by' dropdown is set to 'Name' (1a). The search input field contains 'adams' (1b) and the 'Go' button is highlighted (1c). The table lists various researcher profiles, including 'Adams, Paul D's Profile'.

ID	Name	Date Modified	Owner	State
RP00000274	Williams, Paul T's Profile	10/25/2011 4:33 PM	Noeltest, Suetest	Active
RP00000280	Han, Bong-Gyoon's Profile	10/25/2011 4:31 PM	Sylvester, Cynthia L	Active
RP00000278	Adams, Paul D's Profile	10/5/2011 5:01 PM	Sylvester, Cynthia L	Active
RP00000192	Rebecca J Abergel's Profile	10/5/2011 4:59 PM	Abergel, Rebecca J J	Active
RP00000277	Serrano, Elma L's Profile	6/2/2011 10:21 AM	Blue, Stacey	Active
RP00000276	Bowen, Benjamin Paul's Profile	6/1/2011 4:07 PM	Omoto, Karen L L	Active
RP00000275	Northen, Trent R's Profile	6/1/2011 4:03 PM	Omoto, Karen L L	Active
RP00000203	Abby F Demburg's Profile	6/1/2011 10:34 AM	Test, PhyllisRA	Active
RP00000210	Karen Dickinson-Mazzei's Profile	6/1/2011 10:33 AM	Abergel, Rebecca J J	Active
RP00000202	Priscilla K Cooper's Profile	5/11/2011 4:52 PM	Test, PhyllisRA	Active

- 1d. Select the PI whose Researcher Profile you want to edit by clicking on the hyper-link.

The screenshot shows the 'eSRA Proposal System' interface. The 'Researcher Profile' section is active. The 'Filter by' dropdown is set to 'Name' and the search input field contains 'adams'. The 'Adams, Paul D's Profile' link is highlighted (1d).

ID	Name	Date Modified	Owner	State
RP00000278	Adams, Paul D's Profile	2011 5:09 PM	Sylvester, Cynthia L	Active

2. Edit the Profile

2a. This is the Researcher Profile Workspace.

2b. Click "Edit Researcher Profile" to open the researcher's profile.

The screenshot shows the 'Researcher Profile' workspace for Paul D Adams. The page title is 'Adams, Paul D's Profile'. The 'Current State' is 'Active'. There are buttons for 'Edit Researcher Profile' (circled in red) and 'Generate Documents'. The 'History Log' table shows several 'Profile Updated' entries by Sylvester, Cynthia L. A red bracket on the right side of the page is labeled '2a'.



Do not click on the researcher's name which looks like a hyper-link.

2c. You can scan through the Research Profile View by View using the "Continue" key.

The screenshot shows the navigation bar at the bottom of the profile page. The 'Continue >>' button is circled in red. Below the navigation bar, the text 'Researcher Profile: Paul D Adams' is visible.

3. "Jump to" section to edit

3a. You can "Jump to" a specific View using the drop down on the menu bar.

The screenshot shows the navigation bar with the 'Jump To:' dropdown menu circled in red and labeled '3a'. The 'Continue >>' button is also visible on the right side of the navigation bar. Below the navigation bar, the text 'Researcher Profile: Paul D Adams' is visible.

4. Finish editing



- 4a. Click "Save" to save your work each time you have made an edit on a page and are ready to "Jump to" another page.
- 4b. Click "Exit" to save and exit when all editing is complete.

# Troubleshooting



The Researcher Profile was created by a combination of information populated into the Researcher Profile from the HRIS system and information entered by the creator of the Researcher Profile.

Information that was not needed for one proposal might now be required by the sponsor for a different sponsor.

## Commons Errors on Researcher Profiles

Problem with Proposal	Edit in Researcher Profile to Resolve the Problem	View (Location)	Section/Question
eRA Commons ID is missing on the Person Profile	Enter the eRA User Name	Contact Information & Attachments	2.0 eRA User Name
DOD CDMRP User ID is missing on the Person Profile	Enter the DOD CDMRP Name	Contact Information & Attachments	3.0 DOD CDMRP User Name
NSPIRES User ID is missing on the Person Profile	Enter the NSPIRES User Name	Contact Information & Attachments	4.0 NSPIRES User Name
Person Profile in SF424 is missing "Dr."	Add the Honorific (this information is not part of the HRIS information)	Contact Information & Attachments	1.0 Honorific
Researcher's position is missing from the SF424 R&R page and/or the Person Profile	Add the Title (this information is not part of the HRIS information)	Contact Information & Attachments	1.0 Title

Problem with Proposal	Edit in Researcher Profile to Resolve the Problem	View (Location)	Section/Question
Researcher's position is incorrect on the SF424 R&R page and/or the Person Profile	This could be caused by: 1) Prior user entered payroll title instead of publically used title – correct by changing the title 2) Researcher's title might have changed since the last update to his or her profile – correct by changing the title	Contact Information & Attachments	1.0 Title
Researcher's phone or fax # is missing from the SF424 R&R page and/or the Person Profile.	Phone #s (only the office phone # is part of the HRIS information)	Contact Information & Attachments	2.0 Phone #s
Researcher's email is missing from the SF424 R&R page and/or the Person Profile	Email Address: (this information is not part of the HRIS information)	Contact Information & Attachments	2.0 Preferred email
Received zip+4 error message in SF424	Zip code is only 5 digits in HRIS and the creator of the Researcher Profile forgot to add the final 4 digits. You can find the zip+4 on the U.S. Post Office Website.	Contact Information & Attachments	3.0 address information
Researcher's address is wrong on the SF424 R&R page and/or the Person Profile	This could be caused by: 1) Incorrect information in HRIS – correct the address field 2) Mis-spelling of "Cyclotron" is a common mistake in HRIS and the creator of the Researcher Profile did not notice the spelling – correct the address field.	Contact Information & Attachments	3.0 address information
The Person Profile in the SF424 is not listing the highest degree	This could be caused by: 3) Education is not listed – correct by adding the highest degree attained 4) Too much education is listed and eSRA is choosing the wrong education - correct by deleting any education listed after the highest degree.	Researcher's Profile	2.0 Education