

evisions
RESEARCH CONFERENCE

General Session
July 18, 2016

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Welcome!

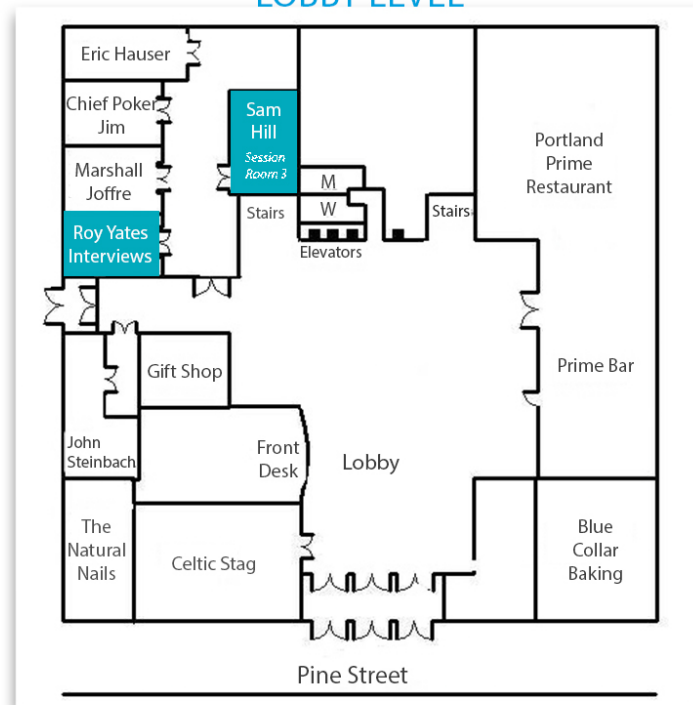
- 1 Logistics** → Nicole Daily
- 2 Company Overview** →
Matt McLellan
- 3 Product Update** →
Harris Hunt and Joe Chin
- 4 Closing** → Nicole Daily



Embassy Suites Downtown - Portland

Venue Map – Lobby Level

LOBBY LEVEL

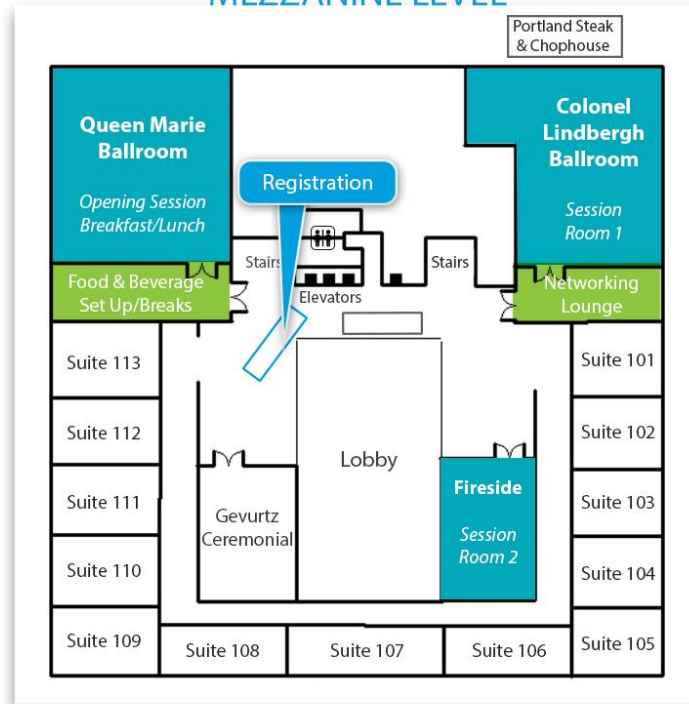




Embassy Suites Downtown - Portland

Venue Map – Mezzanine Level

MEZZANINE LEVEL



Other Activities...

- Professional Headshot Photo Booth in the Networking Mix & Mingle Lounge!
- **Monday & Tuesday Morning:** Morning runs with Michael Liwski and Kevin Ferrell
- **Monday Night:** Networking Reception
- **Monday Night:** Dinner groups to the Food Trucks and Voodoo Donut run with the Evisions Team



Need WiFi?

General Code:
Evisions16

Presenter Code:
presenter2016

Mobile App!

- **Download NOW!!**
- Extremely user friendly
- Create a profile
- Build your own agenda
- Presentation decks available
- Venue maps
- Evaluation form
- Portland hot spots



We Want Your Feedback!

- Tell us how what you think about this year's conference
 - Use the mobile app
 - Talk to Evisions staff
- Topics we want to know:
 - What changes would you want to see next year?
 - What should we make sure we do the same?



Join The Conversation

#evisionsandyou



[linkedin.com/company/Evisions-Inc](https://www.linkedin.com/company/Evisions-Inc)



twitter.com/EvisionsInc



[facebook.com/EvisionsInc](https://www.facebook.com/EvisionsInc)



Thank You!

Please contact the Evisions Marketing Team if you have any questions.



WELCOME!

9th Annual Evisions
Research Conference

Matt McLellan
President

evisions

Conference Goals

**Practical
Strategies**



**Expand Your
Community**

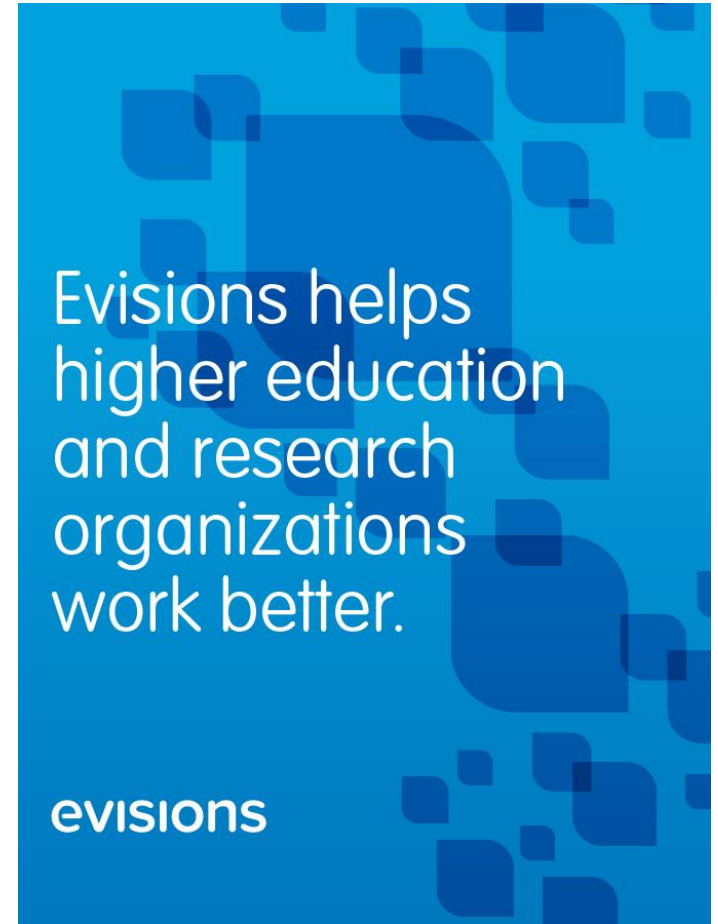


**Gain Valuable
Insights**



Company Overview

Empowering Education
and Research



New Branding

eVISIONS

You support others. We support you.



Experience You Can Trust

22+

Years of research
expertise

150

Research
Customers



User-friendly
solutions



Super
service



Exceptional
value



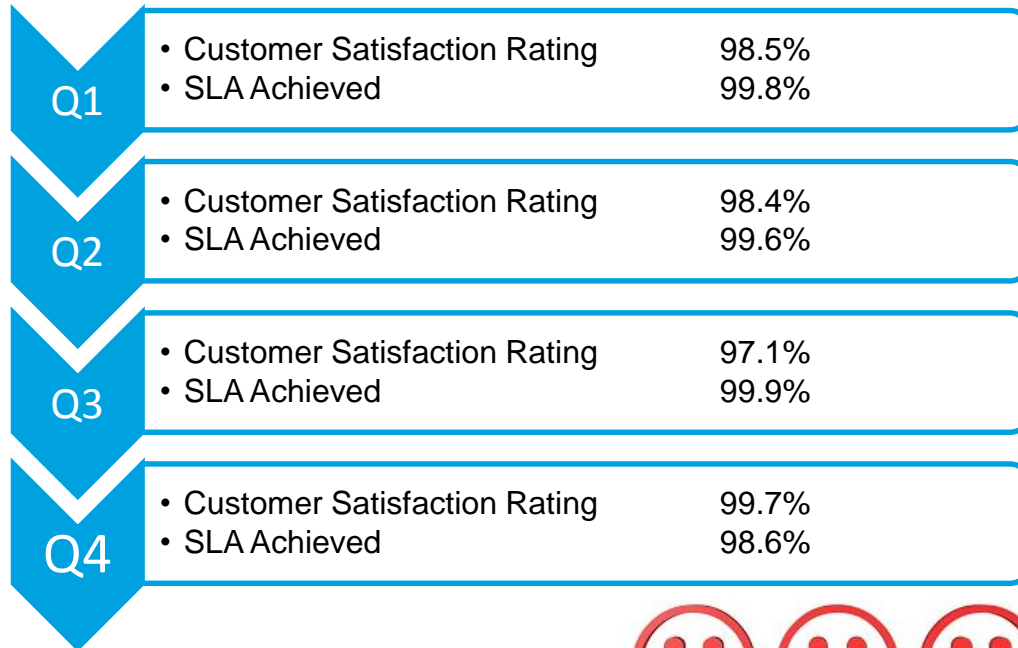
Smart
technology



Industry
expertise

Our Commitment to Customer Success

2015 Customer Support Ratings – Research Administration



Avg Ticket Satisfaction Rating: 98%



We've turned a new leaf

Increased Investment in Research

Expanded Executive Leadership Team



Matt McLellan,
President



Shirley S. Gonzalez,
VP of Sales *(New)*



Harris Hunt, VP of Product
Management *(New)*



Adrian Huether, VP of
Finance & Administration



Vince Kenkel,
VP of Engineering



Michael Liwski,
VP of Marketing



Kevin Marshall, VP of
Professional Services



Shellie Parker,
VP of Product Support

Commitment to Community

SRA Sponsor

4 Years Running

5 regional & annual
events in 2016

NCURA Sponsor

4 Years Running

8 regional & annual
events in 2016

PRIM&R Sponsor

2 Years Running

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Our Commitment to Your Future



Continue to
modernize
our products



Leverage
industry
best
practices



Expand
mobile
support



Continue to
provide new
solutions
and features



Thank You!



PRODUCT MANAGEMENT

Delivering a great
customer experience

Harris Hunt
VP Product Management

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Our commitment to

Research Administration



Product Strategy

Build on our strong foundations while continuing to...

Enhance



Extend



Modernize



Product Investment

- Current and New Products
- Improving the User Experience
- Focus on Quality
- Delivering Value
- Expanded Product Team
- Expanded Engineering Team
- Unrivaled Product Support
- Expert Professional Services

cayuse 424^o cayuse SP^o



IRB



IACUC



COI



Delivering Value

Enterprise performance on a University budget...



Expanded Product Team

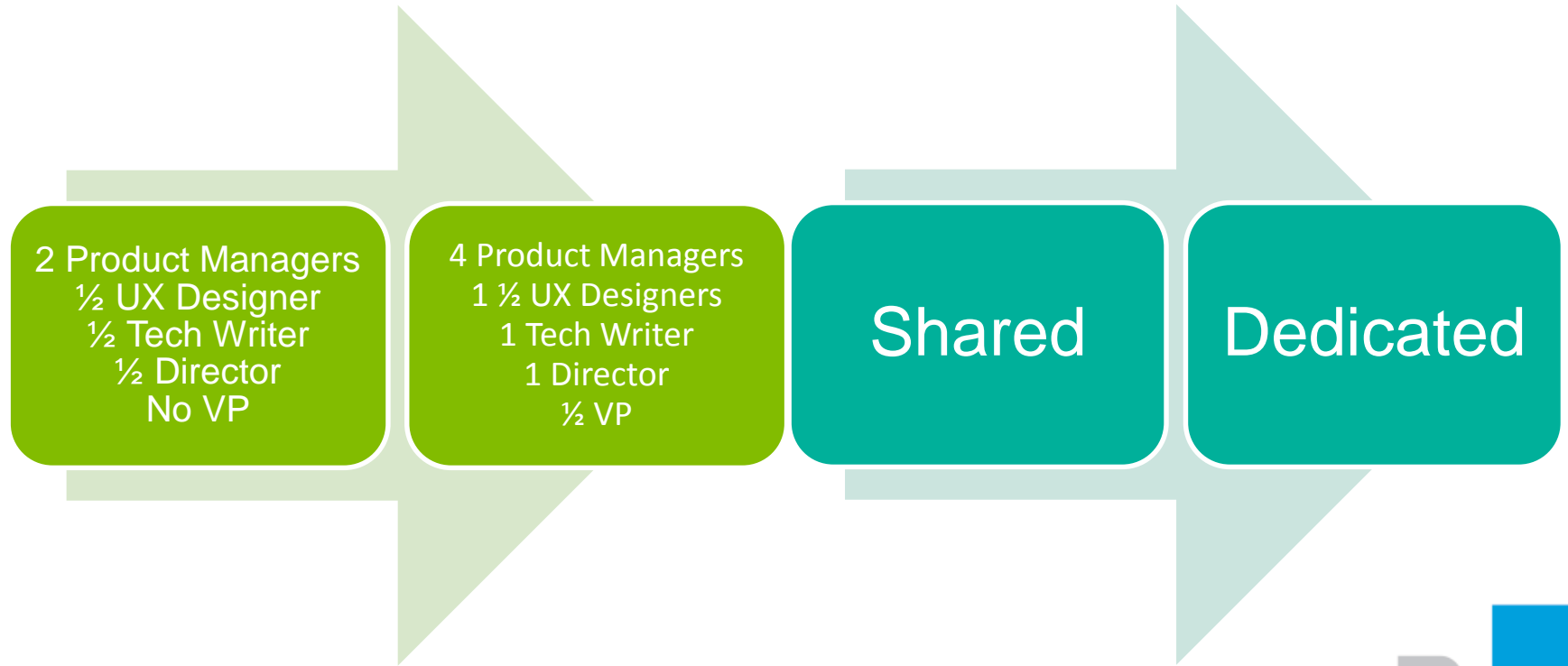
2 Product Managers
½ UX Designer
½ Tech Writer
½ Director
No VP of PM

4 Product Managers
1 ½ UX Designers
1 Tech Writer
1 Director
VP of PM

3½

8

Expanded Product Team



Ben Priest Retirement

Retiring next month after more than 15 years building industry-leading eRA solutions, notably:

- ❑ Launched 424 in May 2006
- ❑ 99% coverage on Grants.gov
- ❑ Billions of Research Dollars
- ❑ Over 150 Research Institutions



Introducing Joe Chin

Director, Product Management –
Research Administration

- ❑ Dynamic
- ❑ Passionate
- ❑ Knowledgeable





Roadmap Update

Joe Chin
Director, Product Management
joe.chin@evisions.com

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SINCE WE LAST MET

A year in review

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Cayuse 424 – 7 Product Releases



3

New forms



10

Revised forms



5

Limited support forms

- A major review and overhaul of the NIH and NSF validations
- Added support for "Competition Title" in the opportunity listing
- Extended the integration API capabilities

Cayuse SP – 3 Product Releases



- Added Project and Award Statuses to give a complete overview of research in all stages of the project life cycle
- Added the ability to track third-party cost share to provide more accurate proposal budgets
- Made improvements to the creation of awards and the management of subcontracts



Cayuse IRB – 6 Product Releases



Boards and Meetings



Minutes Builder



Emails & Notifications

- Added the ability to change the assigned reviewers or the assigned board
- Expanded meetings to include the ability to send an agenda, start the meeting and approve the minutes so all meeting information is housed in Cayuse IRB
- Analysts can now edit the text, add images and specify which groups or individuals will receive notifications

WHAT'S TO COME

Looking ahead

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What's planned for the rest of 2016

Cayuse 424

- Ongoing form additions, revisions, and maintenance
- Local entry of Senior/Key Person Information
- Support for UTF-8 characters

Cayuse SP

- Enhanced search capabilities for departmental admins
- Ability to send emails to contract specialists
- Enhanced split appointment tracking from proposal to award

Cayuse IRB

- Enhancements to e-forms, reporting and accessibility
- Integration with other RS products
- Performance enhancements



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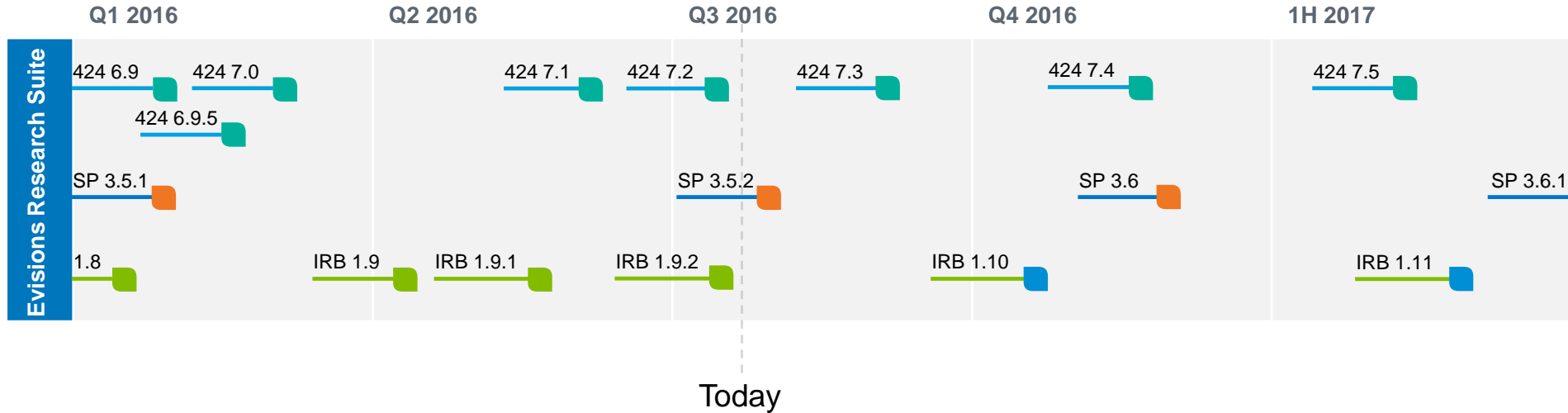
Research Suite Roadmap

*Availability: IRB is generally available now. IACUC and COI are intended to be released in 2016 and 2017.

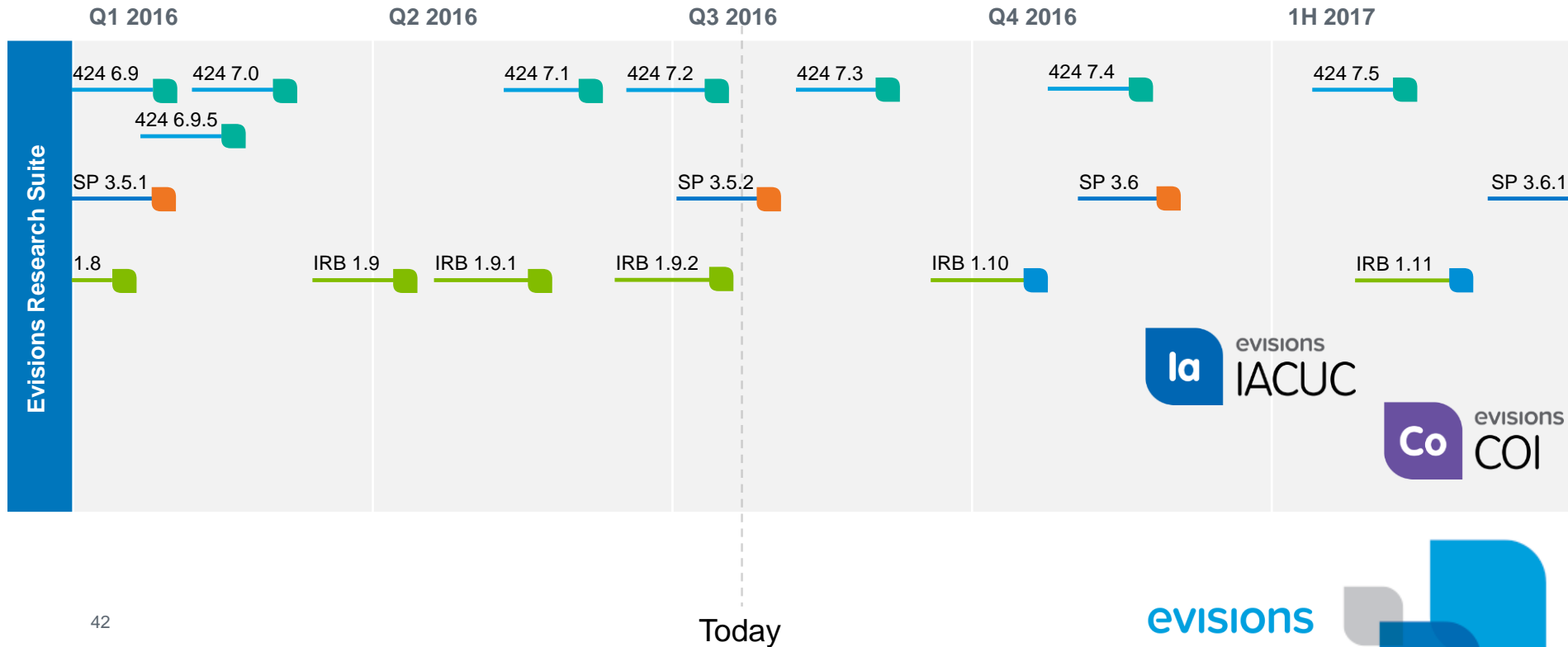
Forward-Looking Statements:

This document contains forward-looking statements including, among other things, our expectations for future applications and performance. The words “believe,” “may,” “will,” “anticipate,” “intend,” “expect,” and similar expressions are intended to identify forward-looking statements. These forward-looking statements are subject to risks, uncertainties, and assumptions. Evisions assumes no obligation to, and does not currently intend to, update any such forward-looking statements in the future. Any unreleased services, features, or functions referenced in this document, our website including blog posts or other press releases or public statements that are not currently available are subject to change at Evisions’ discretion and may not be delivered as planned or at all. Customers who purchase Evisions products should make their purchase decisions based upon products, features and functions that are currently available.

Research Suite Roadmap



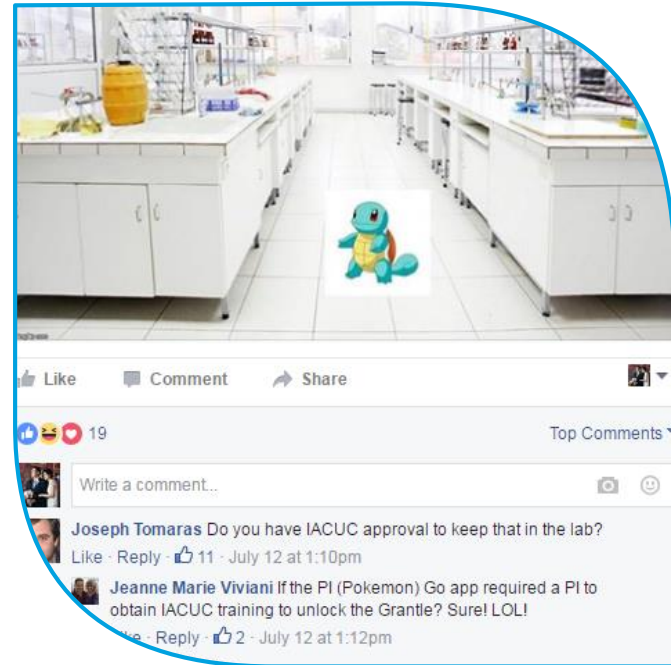
Research Suite Roadmap



- An animal care and use compliance management system
- Simplifies the review process
- Ensures your institution's animal research complies with federal, state and institutional policies
- Launching Q4 2016
- Interested in being part of the BETA Program? Talk to Amy or Joe



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IACUC : Preview

Easily Manage

- Techniques
- Agents
- Animals

Technique Details

[Technique List](#) / Technique Details

Delete Save

Name

Technique Type



Easily Manage

- Techniques
- Agents
- Animals

Agent Details

[Agent List](#) / Agent Details

Delete Save

Name

Acetominphen

Agent Type

Barbituate



Easily Manage

- Techniques
- Agents
- Animals

Animal Details

[Animal List](#) / Animal Details Delete Save

Name USDA

Sprague Dawley No

Animal Type

Mouse

Approved Techniques

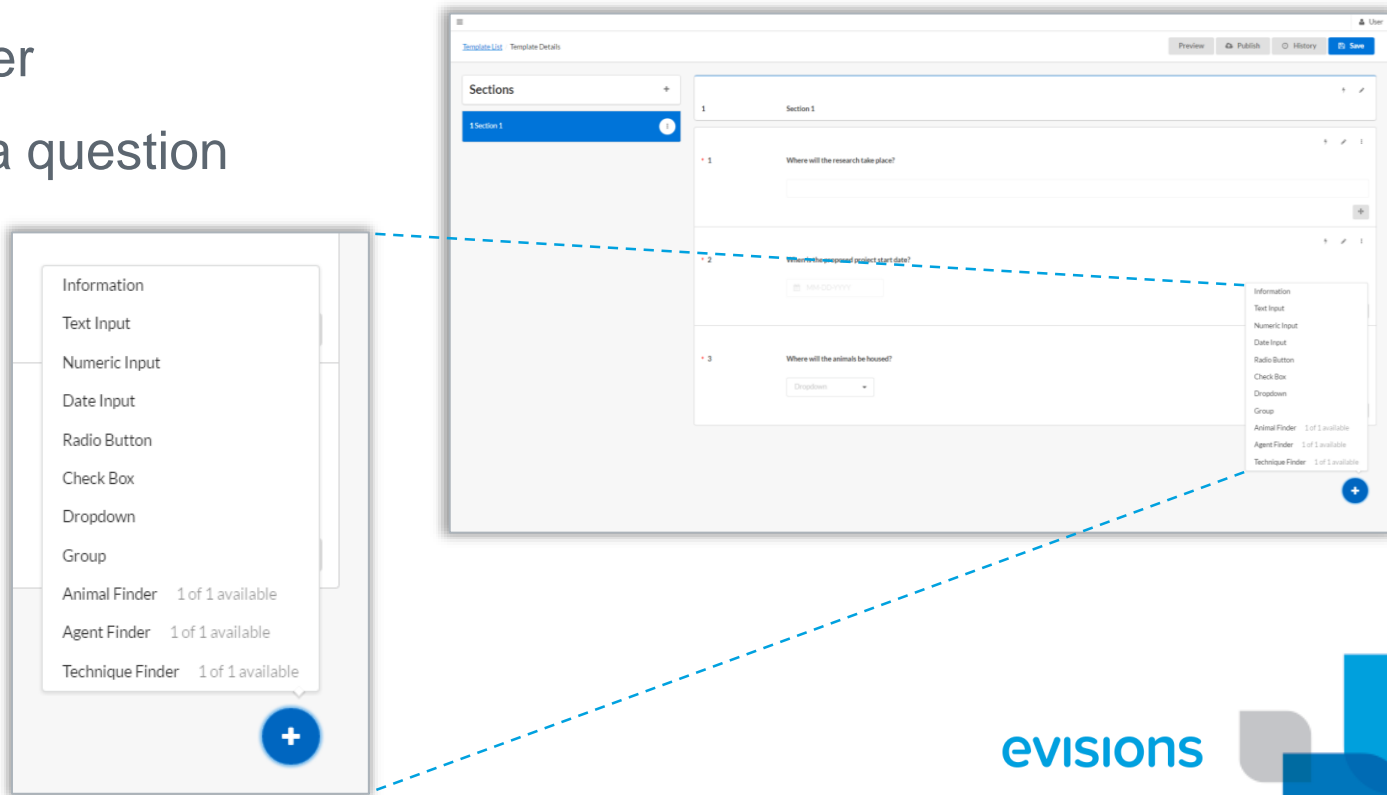
Add Technique Add!

Add Technique

Name
... Nail clipping

Form Builder

- Adding a question



The screenshot displays the 'Form Builder' interface. On the left, a 'Sections' panel shows '1 Section 1'. The main workspace contains a form with three questions:

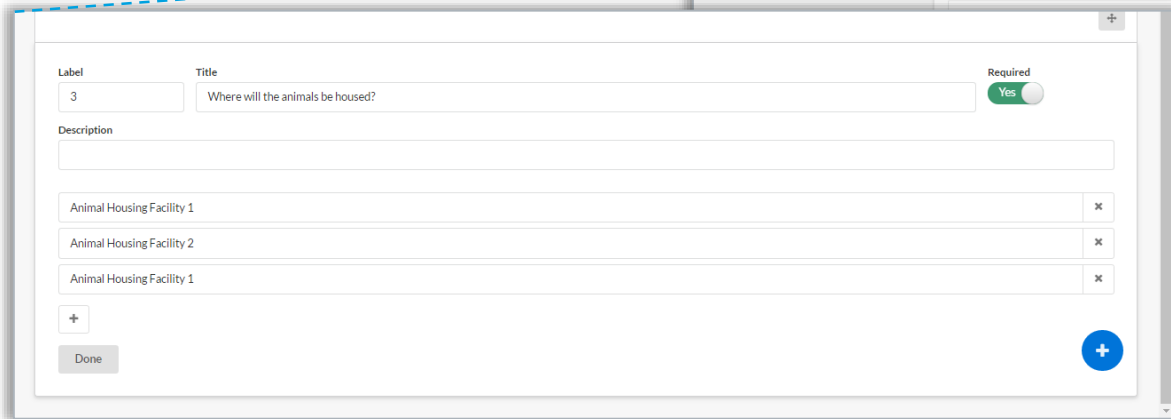
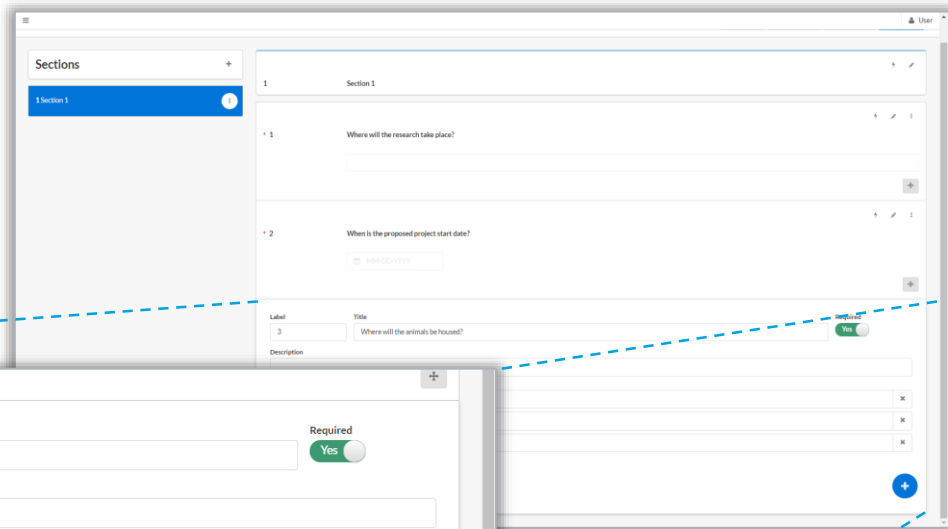
- Section 1: 'Where will the research take place?' (Text Input)
- 'Where will the research project start date?' (Date Input)
- 'Where will the animals be housed?' (Dropdown)

On the right, a 'Widget Library' lists various input types: Information, Text Input, Numeric Input, Date Input, Radio Button, Check Box, Dropdown, Group, Animal Finder (1 of 1 available), Agent Finder (1 of 1 available), and Technique Finder (1 of 1 available). A dashed blue line indicates a widget being added to the form.



Form Builder

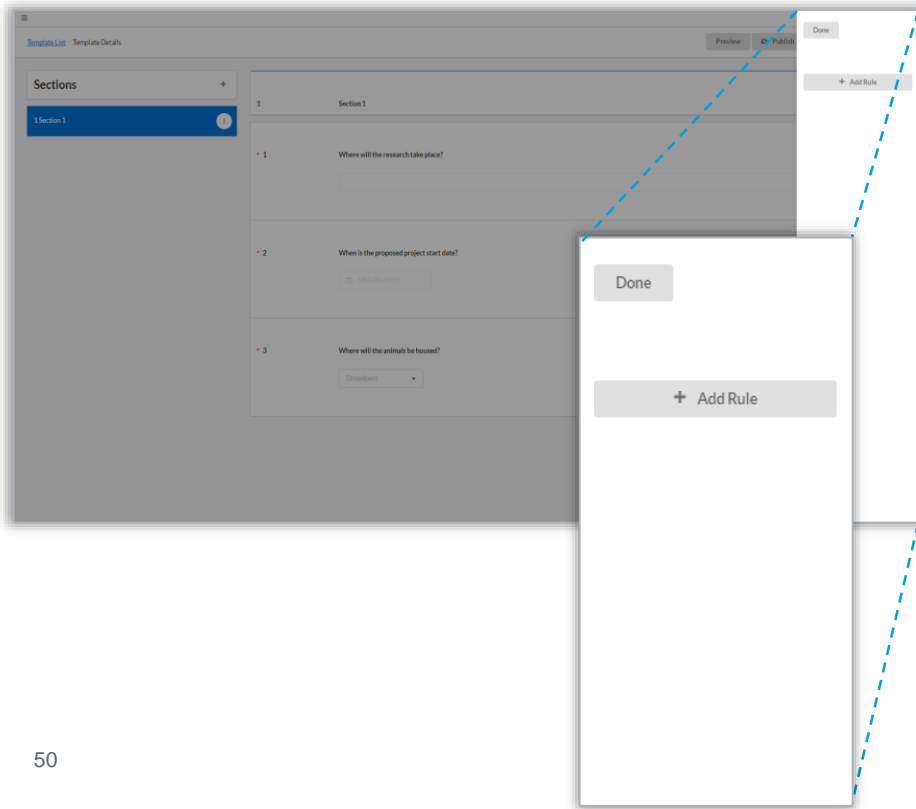
- Adding a question
- Configuring the question





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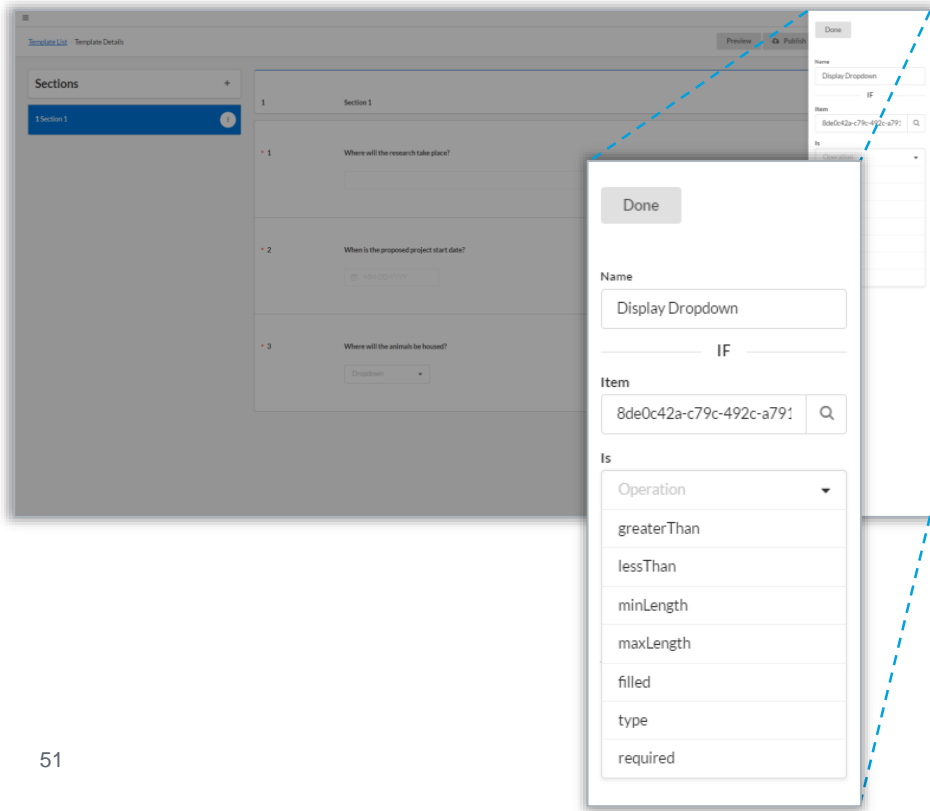
IACUC : Preview



Question Rules

- Adding a rules to a question

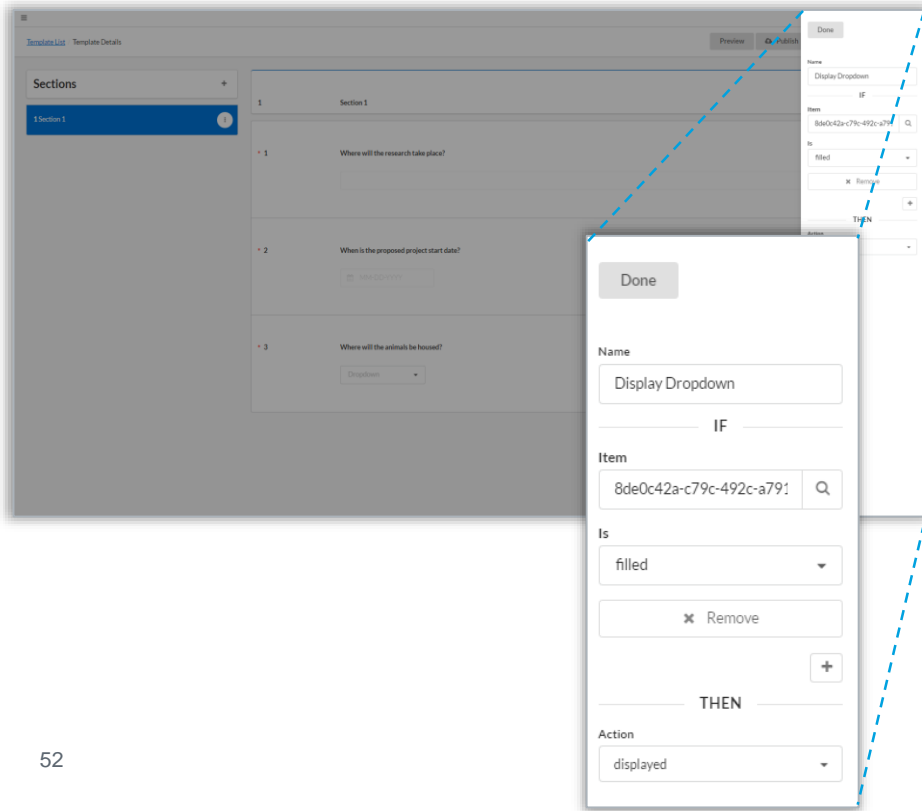




Question Rules

- Adding a rules to a question
- Rules can check for the existence of an answer, the format, and content of the answer



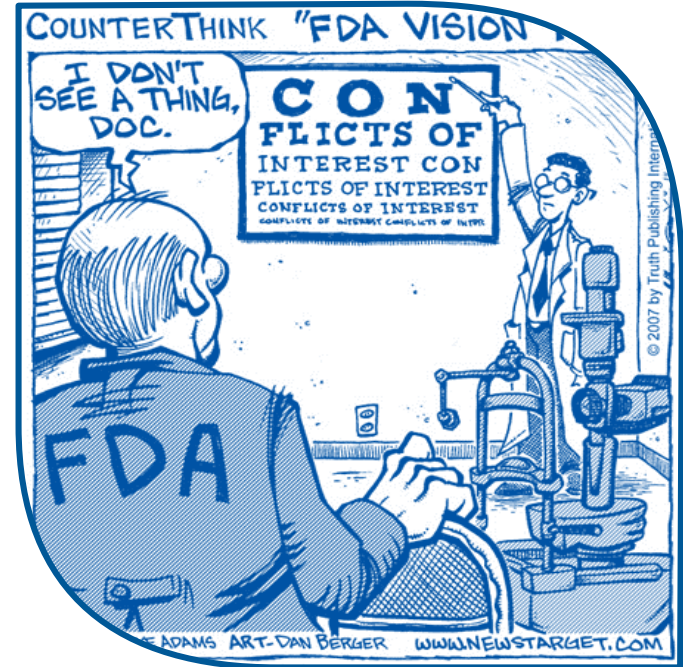


Question Rules

- Adding a rules to a question
- Rules can check for the existence of an answer, the format, and content of the answer
- Outcome of a rule can be used to dynamically adjust other parts of the form

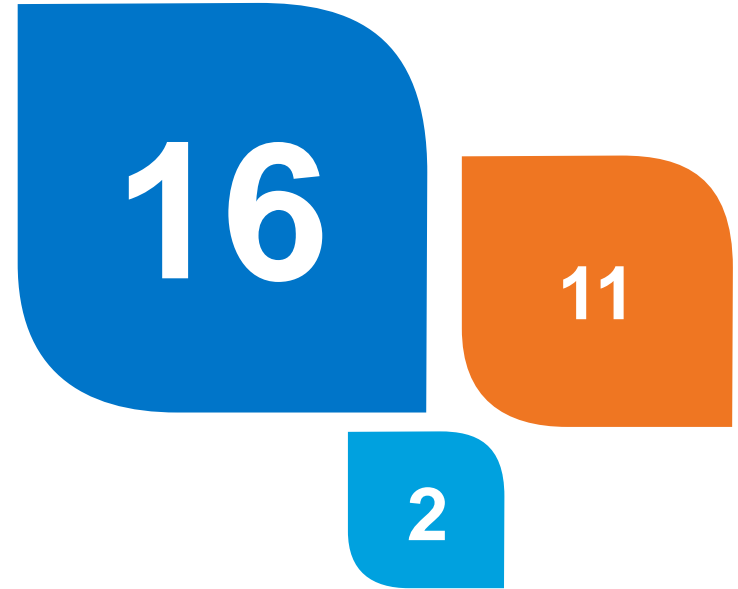


- A conflict of interest compliance management system
- Simplifies the review and reporting of financial conflicts
- Ensures your research staff complies with federal, state and institutional policies
- More information coming Q1 2017



Wrap Up

- We have a dedicated team focused on supporting you and your institution
 - Product, Engineering, Support, Professional Services, and Sales
- Continued evolution of our products
 - 16 product releases since last ERC
 - 11 product release planned
- Two new products on the horizon



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You support others. We support you.

Enjoy the Conference!

Sessions begin in
5 minutes

