

****NOTE: All sessions and session times are subject to change****

Agenda Outline

Monday, July 20th		
<i>Evisions Research Conference Agenda (tentative)</i>		
	1	2
8:00am-9:30am	CHECK - IN / Breakfast	
8:45am-9:45am	General Session	
9:45am- 10:45am		
10:45am-11:00am	Coffee Break	
11:00am-12:00pm		
12:00pm- 1:00pm	LUNCH	
1:00pm-2:00pm		
2:05pm- 3:05pm		
3:05pm- 3:20pm	Afternoon Break	
3:20pm- 4:20pm		
4:30pm- 5:30pm		

Tuesday, July 21th		
<i>Evisions Research Conference Agenda (tentative)</i>		
	1	2
7:45am-8:30am	Breakfast	
8:30am-9:30am		
9:35am-10:35am		
10:35am- 10:50am	Coffee Break	
10:50am- 11:50am		
11:50am-1:00pm	Lunch	
1:00pm-2:00pm		
2:05pm- 3:05 pm		
3:05pm-3:20pm	Afternoon Break	
3:20pm-4:20pm		

Birds of a Feather: Cayuse 424

Are you using Cayuse 424? If so, join other users at informal discussion group. Come with questions, experiences and ideas. Hear what others are doing with Cayuse 424. Get your questions answered. Join the audience led discussion for the opportunity to share and network with others like you.

Birds of a Feather: Cayuse IRB

Are you using Cayuse IRB? If so, join other users at informal discussion group. Come with questions, experiences and ideas. Hear what others are doing with Cayuse IRB. Get your questions answered. Join the audience led discussion for the opportunity to share and network with others like you.

Birds of a Feather: Cayuse SP

Are you using Cayuse SP? If so, join other users at informal discussion group. Come with questions, experiences and ideas. Hear what others are doing with Cayuse SP. Get your questions answered. Join the audience led discussion for the opportunity to share and network with others like you.

Bridging the gap: Integrating Cayuse 424 with your enterprise systems using Application Programming Interfaces (APIs)

Matty Gilreath, Evisions

In this panel discussion, clients from University of Southern California, Stanford, and University of California, Irvine will share their innovative successes in using APIs to seamlessly integrate Cayuse 424 with homegrown, open source and 3rd party campus systems. Ben Priest will provide an overview of how APIs function; Matty Gilreath will review the implementation process involved.

Cayuse 424 Update

Ben Priest, Evisions

An annual review of accomplishments, activities, and goals for the Cayuse 424 product. The presenter always prognosticates, sometimes expecorates, but never prevaricates during a lively discussion of developments in the world of Federal proposal preparation and submission.

Cayuse IRB Template Building

Carrie Yakura, Evisions & Amy Kimble, Evisions

With the accessibility and ease of Cayuse IRB, you have the control to create all of your institution's IRB forms and keep them current. In this session, we will learn how to build an initial submission template from the ground up, take a look at examples of templates from real clients, and explore the complexities of branching logic to accommodate multiple compliance requirements. Attendees are encouraged to bring their laptops, as well as PDF or Word samples of their own submission forms.

Change Happens...Are You Ready?

Bethany Northquist, Evisions & Susan Stearsman, Villanova University

Change is inevitable and, although it appears threatening, progress is not possible without it! This session provides tips on how to approach, shape, and implement change at your organization.

Susan Stearsman, Director for the Office of Research Administration at Villanova University, will be joining me to share some of her tips and tricks on how she and her team have not only dealt with change but embraced it!

Crowd Funding for the Administration Side

Cynthia Bellas, Evisions

Research has become increasingly complex, unsurprisingly, an intellectual divide has arisen between citizens and the projects their tax dollars fund. As Scientists prepare their traditional funding proposals they have alternate opportunities which they need to consider in crowdfunding. The work of Research operatives is something the community can relate to, bridging the gap between difficult complexities and the everyday. If the work of Research Administrators is explained and included in these requests for crowdfunding, much needed resources can be allotted to the supporting office while increasing the project's mass appeal.

Attend this session to learn about various research oriented crowd funding outlets and tips for development of researcher profiles on various research crowd funding sites in order to increase funding opportunities. You'll be able to take this information back to your institution in order to make informed decisions around whether or not to pursue crowd funding for certain projects.

How the Connect Products Work

Jason Groves, Evisions & Stephen Weaver, Evisions

As a standalone product, the Evisions Research Suite is a collection of products designed to support Proposals throughout their entire life cycle. That begs the question: Where do the Connect products fit into that ecosystem? Join us for a high-level, non-technical overview of:

- Cayuse 424/ Cayuse SP Data Connect: A solution for moving the data from the Research Suite to your Data Warehouse.
- HR Connect: Providing your organization with a secure and painless way to load and update users in the Research Suite.
- Finance Connect: Integrating the Research Suite with your Enterprise Resource Planning (ERP) System.

How to Get us Good Data

Jason Groves, Evisions & Frank Skettino, Evisions

In this session we will demonstrate a SQL Validation Methodology that utilizes SP Data Connect to help prepare a CSV utilized during an 'Add' &/or 'Update' run for HR Connect. Includes parallel discussion opportunities for generating iDT/ADT/LDTs for implementation.

How to Train Your Institution

Carrie Yakura, Evisions and Kelly Morgan, Evisions

Effective ways on how to train your institution and how to put together an ongoing training program for Cayuse 424, Cayuse Sponsored Projects, and Cayuse IRB.

Introduction to Cayuse IRB

Joe Chin, Evisions & Kevin Ferrell, Evisions

Do your protocol submissions often get lost in the paper shuffle? Would you like to create and update questionnaires without IT or high priced consultants?

Attend this session and learn how Cayuse IRB enables you to take charge of your compliance. This easy to use solution provides visibility into the protocol creation, review and submission process. Get one place to track and manage initial submissions, modifications, reportable events and continuing reviews. Ensure protocols and reviews receive timely attention with automated notifications.

Loving your proposal budget—How to deal with Advanced Budgets in Cayuse 424

Carlee Connet, Evisions

In this session we will review some of the more challenging aspects of Cayuse 424 budgeting, including the SF424 Detailed and Modular budgets and how settings in your Institutional Profile can decrease entry time and help reduce errors. We'll examine why you may not be able to enter / change months in the Calendar or Academic/Summer months fields, and how to unlock those fields. And what the dreaded Red Star means to you and your budget. Then we'll look at using Replicate/Escalate to help reduce data entry and handle salary and fringe increases over project years, and end this section with managing imported/linked subaward budgets within your proposal and some of the most common issues.

We will also look at quite possibly the most misunderstood budget form -- the SF424A Budget and how to determine which way to properly fill it out. As well as touching on the SF424 Fed + Non-Fed budget and a tip or two about how it works and what it's asking. And finally we will look at two of the newest additions: The Multi-Project Overall Additional IDC Budget and the Multi-Project Training Budget.

Managing the Post Award Lifecycle

Kelly Morgan, Evisions & Erica Beffert, Evisions

This session will present best practices for using new features in Cayuse SP to help manage your Post Award records. We will introduce new ways of monitoring Post Award statuses, the Award Budget, and using the Workflow module to track and record Post Award Actions.

Monitoring Subrecipients

Kelly Morgan, Evisions & Erica Beffert, Evisions

Come hear about changes in the Cayuse SP application that will help more appropriately manage and monitor subrecipients. We will also be discussing ways to use other areas of the application to assist in subrecipient monitoring, and inviting participants to share their ideas, plans, and best practices.

New Functionality is on the Way: How to Manage the System Changes on Your Campus

Kim Schulman, New York University & Terri Hall, University of Notre Dame

Cloud-based systems like the Evisions Research Suite provide many benefits to research organizations, one of those being overnight releases. As much of a convenience as this is, it can also cause quite a stir if the appropriate steps are not taken to communicate and prepare users for new features or changes in functionality that affect their daily work. In this session, the University of Notre Dame and New York University share best practices and examples of how they prepare their user communities for the upcoming system changes and how you can ensure the transition is a smooth one for everyone.

Oh the Humanity

Carrie Yakura, Evisions & Kelly Morgan, Evisions

Bringing back humanity to research administration culture and processes in the 21st century. Technology is great, but how do you capitalize on automation without sacrificing the human element? In this session, we will examine reasons for and against automation as well as how to ease fears among your staff when moving toward an automated process.

Rekindle the love! One year or more after your Cayuse SP implementation, are you ready to tune-up your software to rethink/enhance your business practices

Jason Groves, Evisions & Matty Gilreath, Evisions

In this session, Jason and Matty will discuss ways you can re-excite your user base and make the most of your Cayuse SP by testing out new business processes, configurations, and/or our latest product features.”

Strategic Planning to Meet Changing Sponsored Research Environments

Jon Teuber, Ann & Robert H. Lurie Children's Hospital of Chicago

The field of sponsored research and sponsored program administration is evolving and entering a period under new federal regulations and record-high competitive levels for diminishing federal funding. As research organizations grow, it is imperative for the sponsored research management infrastructure to also grow to meet both internal and external changes. External and internal funding pressures and changing research environments impact growth and change for both researchers and for research administrators. This session will discuss one institution's current efforts to expand its pre-award and post-award staff and change its operating model as the institution expands its research operations. As part of that planning process, this presentation will demonstrate where Cayuse SP proposal and award modules and Cayuse reporting tools are utilized to present summary and detailed level data on sponsored program trends to drive the discussion forward.