

UX accomplishments over the past yearish

...mercilessly raced through on Wednesday October 6, 2022



UX charter



How does the UX team contribute to what are we meant to do and accomplish?

- *Understand* organization and user needs and behavior and design highly usable, useful, and accessible interfaces to suit
- *Improve* intelligibility, usability, and inclusiveness across all of our products, thereby avoiding training and support costs and improving user satisfaction
- *Investigate* emerging client and prospect needs and offer conceptual designs for validation and subsequent planning





Enabling items

Things that help us make things and learn things

- Design system/pattern library, continuously improving, including
 - Standard control-level acceptance criteria
 - Standard styles
 - Accessibility-related behavior and acceptance criteria (rapidly improving)
- Research participant recruiting strategy, including
 - Email templates
 - Regularly promoted online signup form
 - Signup auto-response and invitation to private Cayuse Community group
 - eSignature for easy send/return of recording releases

Process improvements

Ways of doing

- NPS interpretation
- Streamlined release note process
- Tools and process for research interviews
- Tools and process for unmoderated usability testing
- Review of accessibility issues and dispatch to tickets, pattern improvements, and “low-hanging fruit” fixes
- Review and theming of support tickets for detection of upstream interventions in accessibility, usability, feature request, etc.
- Implemented north star metrics/primary workflows in Pendo for SP, filterable by persona
- Preliminary work for north star metrics/primary workflows in Pendo for Inventions
- Introduced specific accessibility requirements to UX specs, patterns, and acceptance criteria
- Burden survey pilot in SP Classic
- Weekly design critique
- Initiated “Product Trio” meetings on products that didn’t have them

Training

Talking about ways of doing

- Made eA accessibility training mandatory for UX team
- Research interviews
- Product trio
- Three horizons (also known as “benefit, concepts, detail”)
- User-focused process
- Research activities at each stage of the existing Cayuse process



Documentation

Talking with users and customers about what's new

- New articles for SP4, HE2, Inventions
- Updated articles for SP modernization
- Improved release notes and other documentation for HR Connect
- Regularly delivered release and patch notes for internal and external audiences
- Documented product permissions by role
- Edited all new Pendo guides
- Overhauled the Expert Tool user documentation

Designs!



Made a lot of things

- Many patterns, including common header, product picker, profile menu, page title area, summary area, tables and pagination, form and form segment navigation improvements, primary, secondary, and grouped tertiary (more) actions, modal dialog boxes, simplified form builder components, nested distribution components
- Human Ethics
 - Secondary and additional reviewer UI
 - Check-in date recurrence
 - Modification submission
 - Renewal submission form and template
 - Improved multi-select filter UI
- Outside Interests
 - Form builder improvements
 - Summary cards
 - Main navigation scheme
- Inventions
 - Email invoicing
 - Bulk emailing with attachments
 - Distribution templates, distribution schedule creation
 - Research and preliminary work for payment plans
 - Some Cayusification
- Admin
 - Roles and units
 - Role groups
 - Unit management
 - Data provisioning
 - Demographics internationalization
 - Email address sync
 - Validation check
 - Various form redesigns
- Sponsored Projects
 - Task/goal-oriented user personas
 - Cradle-to-grave customer journey mapping
 - Core event research
 - Subawards MVP and research on further needs for subawards
 - Agreements
 - Research, competitive analysis, and usability review of simplified form builder (in collaboration with Risk team)
 - FOR and other AU/NZ code form objects
- Fund Manager
 - Finance projections personas
 - Projections workspace
 - Filter and report modal dialogs
 - Roles and permissions management
 - Chartstring security business rules
 - Compensation projections
 - Non-sponsored funds
 - Personnel and personnel detail
- Resource Management
 - Receiving and waitlisting of orders
 - Campus/facility/room/region setup and nesting
 - Animal sources administration
 - New order process
 - PI views
 - Preliminary work on buyer dashboard
- Researcher/Haplo
 - Preliminary work on key workflows and control rearrangement for Repository



Okay, blah blah

- Give me some examples
- Explain why I should care

Inventions: Emailing of invoices



cayuse Inventions

Global Search

2845 (Open)

Invoice #: 2845

Invoice Type: Historical Invoice

Agreement: A2012-1243 - Synalloy Corporation

Payee: The Ohio State University (OSU)

Due Date: 9/5/2013

Created Date: 8/14/2017

Last Update Date: 10/30/2019

Sent Date: 8/6/2013

WO/Void Date: (None)

Payment Term: NET 30

Ref. #: i-0000004882

Customer PO: (None)

Contact Info From: Contact Info from Agreement

Send To: Synalloy Corporation
1000 Alum Creek Drive, Columbus, OH 43210, United States of America

Invoice Total: \$2,300.94

Interest: \$0.00

Paid: \$0.00

Disputed Amount: \$0.00

Paid-In-Full Date: (None)

Note: (None)

Internal ID: 4882

1. Export invoice

2. Export relevant docs

3. Write email

4. Attach items

5. Look up addressees

[View](#) | [Accept Payment](#) | [Void Invoice](#) | [Void & Clone Invoice](#) | [Mark Invoice As Paid](#) | [Write Off Invoice](#) | [View Edit History](#) | [Send Invoice Via Email](#)

Section Settings All Line Items Notes Uploads

Line Items (3) Export

| Original Line Item | Date ▲ | Line Item Type | Description | Quantity | Amount | Paid | Variance | Account Code | Compliance Reference Number |
|--------------------|------------|----------------|--|----------|------------|--------|------------|--------------|-----------------------------|
| | 12/31/2011 | Expense | Anonymized Invoice Line Item Description | 1 | \$507.63 | \$0.00 | \$507.63 | | |
| | 3/31/2013 | Expense | Anonymized Invoice Line Item Description | 1 | \$2,894.00 | \$0.00 | \$2,894.00 | | |

Reports Dashboard Technologies Patents Agreements Finances Forms 

Global Search    

Invoices / Invoice INV-OISIF-02845

Email Invoice

Select a Template

Email Invoice Template 1

To:

 fakeemail692@youshouldgetinnovate.com (Synalloy Corporation) 

CC:

 RobC@Company.com (FirstName LastName)  Anders@Company.com (FirstName LastName) 
 neolsTheOne@Company.com (FirstName LastName) 
Start typing an email address...

BCC:

 Start typing an email address...

From: *

AliceA@innovatehosted.com (Alice Liddell)

Subject: *

Invoice (INV-OISIF-00128) | Please Remit Payment

Format **B** *I* U  Lists Link

Hello Synalloy Corporation,

Please remit payment within 30 day from today February 2, 2022.

Thank you,

Please remit payment within 30 day from today February 2, 2022.

Thank you,
Alice



Invoice

| Date Added | Type | Description | Preview |
|------------|---------|-------------|----------------------|
| 5/24/2022 | Invoice | -- | view |

Include Related Documents

| <input type="checkbox"/> | Date Added | Type | Description | File Name |
|-------------------------------------|------------|------------------|---|---------------------------------|
| <input checked="" type="checkbox"/> | 12/5/2016 | Related Document | 1370383 | 1370383.pdf |
| <input type="checkbox"/> | 12/5/2016 | Related Document | Invoice Number: 1390658 Law Firm Matter ID: 029784-9089EP00 | 1390658.pdf |
| <input checked="" type="checkbox"/> | 12/5/2016 | Related Document | Invoice Number: 1390658 Law Firm Matter ID: 029784-9089EP00 | 1390658_EP.pdf |
| <input type="checkbox"/> | 12/5/2016 | Related Document | Invoice Number: 1391405 Law Firm Matter ID: 029784-9089US01 | 1391405.pdf |
| <input type="checkbox"/> | 12/5/2016 | Related Document | Invoice Number: 1391405 Law Firm Matter ID: 029784-9089US01 | 1391405.pdf |
| <input type="checkbox"/> | 12/5/2016 | Related Document | Invoice Number: 1391407 Law Firm Matter ID: 029784-9089JP00 | 1391407.pdf |
| <input type="checkbox"/> | 12/5/2016 | Related Document | Invoice Number: 1370383 Law Firm Matter ID: 029784-9089AU00 | 1370383.pdf |
| <input type="checkbox"/> | 12/5/2016 | Related Document | Invoice Number: 1370383 Law Firm Matter ID: 029784-9089AU00 | 1370383.pdf |
| <input type="checkbox"/> | 12/5/2016 | Related Document | Invoice Number: 1384867 Law Firm Matter ID: 029784-9089JP00 | 1384867.pdf |
| <input type="checkbox"/> | 12/5/2016 | Related Document | Invoice Number: 1384867 Law Firm Matter ID: 029784-9089JP00 | 1384867.pdf |
| <input type="checkbox"/> | 12/5/2016 | Related Document | Invoice Number: 1384867 Law Firm Matter ID: 029784-9089JP00 | 1384867.pdf |
| <input type="checkbox"/> | 12/5/2016 | Related Document | Invoice Number: 1384867 Law Firm Matter ID: 029784-9089JP00 | OSU_9089_JP.pdf |
| <input type="checkbox"/> | 12/5/2016 | Related Document | Invoice Number: 1384867 Law Firm Matter ID: 029784-9089JP00 | OSU_9089_JP.pdf |
| <input type="checkbox"/> | 12/5/2016 | Related Document | Invoice Number: 1384867 Law Firm Matter ID: 029784-9089JP00 | OSU_9089_JP.pdf |

[Send Invoice](#)

[Cancel](#)

[Settings](#) /

Manage My Templates

| Column Header | Column Header | Column Header | Column Header |
|---------------|---------------|---------------|---------------|
| Table Cell | Table Cell | Table Cell | Table Cell |
| Table Cell | Table Cell | Table Cell | Table Cell |
| Table Cell | Table Cell | Table Cell | Table Cell |
| Table Cell | Table Cell | Table Cell | Table Cell |
| Table Cell | Table Cell | Table Cell | Table Cell |

[New Template](#)**Label****Type****To**[Insert into CC](#)

[Form Creator](#) [Inventions Mailbox](#) [Agreement Billing Contact](#) [System Administrator](#) [Manager Primary](#)

[Contact External](#) [Contact Internal](#) [Investigator, Internal - Primary](#)

Type here...

Insert into CC

Form Creator Inventions Mailbox Agreement Billing Contact System Administrator Manager Primary
Contact External Contact Internal Investigator, Internal - Primary

CC

Type here...

Insert into CC

Form Creator Inventions Mailbox Agreement Billing Contact System Administrator Manager Primary
Contact External Contact Internal Investigator, Internal - Primary

BCC

Type here...

Insert into BCC

Form Creator Inventions Mailbox Agreement Billing Contact System Administrator Manager Primary
Contact External Contact Internal Investigator, Internal - Primary

From

Type here...

Subject

Invoice Number Type here...

Insert into Subject

Agreement Ref # Agreement Name Licensee Name Institution Name Invoice Created Date
Invoice Due Date

SP: Admin-only



Sponsored Projects

Products ▾ Chris Tennant ▾ U of PNW

Proposals Projects Awards More ▾ Non Admin Roles

Proposal Name
[My Active Projects](#) / [Name of Project](#) / Proposal 19-0002-P0001

| My Actions | Proposal Summary | In Development |
|---|---|--|
| Complete Review Route for Review | <p>PI: Larry LeadPrincipal Investigator Admin Unit: College of Herbal Medicine</p> <p>Sponsor: National Institute of Health Prime Sponsor: -- Sponsor Deadline: 03/05/2020 11:59 PM Proposed Total Amount: --</p> | <p>Project Begin Date: 06/01/2020 Project End Date: 12/01/2020 Instrument Type: Grant</p> <p>Project: 21-003 Budget: 21-003-P0006 Budget</p> |

Proposal Form Routing History Access Notes Attachments Links

No button to see checklists → All changes save automatically

Proposal Sections

- 1. Proposal Summary
- 2. Research Team and Biosketches 1
- 3. Budget 4
- 4. Proposal Documents
- 5. Name of Section Five
- 6. Name of Section Six

2. Research Team and Biosketches

1. Research Team

Add all team members who will be conducting research, including data collection. For institutional policies regarding credit allocation see the Office of Sponsored Projects FAQ page

+ Add Team Member 0% of total credit has been allocated

Name * Role * Effort *

Internal Association * Credit Calendar Academic Summer

Admin Roles

Proposal Name
[My Active Projects](#) / [Name of Project](#) / Proposal 19-0002-P0001

In Development

| | | | | |
|---|--|--|---|--|
| My Actions | Proposal Summary | Links | Admin Only | Show Checklist |
| Complete Review Route for Review | PI: Larry LeadPrincipal Investigator Admin Unit: College of Herbal Medicine | Sponsor: National Institute of Health Prime Sponsor: -- Sponsor Deadline: 03/05/2020 11:59 PM Proposed Total Amount: -- | Project Begin Date: 06/01/2020 Project End Date: 12/01/2020 Instrument Type: Grant | Project: 21-003 Budget: 21-003-P0006 Budget |

Admin only area

Button to show checklist → **All changes save automatically**

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0% of total credit has been allocated

Name * **Role ***

Internal Association *

| | | | | | |
|---|--|--|--|--|--|
| My Actions | | Proposal Summary | | | |
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Proposal Form Routing History Access Notes Attachments [Links](#) **Admin Only**

Add Notes and Attachments

Format **B** **I** **U** **S** Lists Link

Add note...

Attachment Type
Select... ▾

Drop files here to upload
or
Upload File

Save

| Q Search... | | | | |
|--|---|-----------------|-----------------|--------------------|
| Note | Attachment | Attachment Type | Last Updated By | Date |
| Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla et purus risus. Ut non eleifend risus. Pellentesque vel dignissim mi. Aliquam fringilla nibh urna, quis sollicitudin nunc ornare eu. Proin bibendum mollis lectus, in sagittis enim mattis in. Duis pellentesque elit ullamcorper convallis semper. Nulla cursus placerat mi. | This is the full filename.docx This is the full filename.pdf | Email Email | Amy Admin | 11/12/2019 6:00 PM |
| -- | This is the full filename that might be really long.docx | Email | Amy Admin | 11/12/2019 6:00 PM |

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|--|----|------------|--------------------|
| Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla et purus risus. Ut non eleifend risus. Pellentesque vel dignissim mi. Aliquam fringilla nibh urna, quis sollicitudin nunc ornare eu. Proin bibendum mollis lectus, in sagittis enim mattis in. Duis pellentesque elit ullamcorper convallis semper. Nulla cursus placerat mi. | -- | Anna Admin | 11/12/2019 6:00 PM |
|--|----|------------|--------------------|



Modify Template UCOP Mixed Policy Template (Pool 2)

[← Back to Template Management](#)
Description

UCOP Mixed Policy Template (Pool 2)

[Delete](#)[Save](#)[Copy Template](#)[Add Range](#)[Add Percent](#)[Add Person](#)[Add Group](#)[Add Cost Recovery](#)[Add Admin Fee](#)[Validate](#)[Reset Levels](#)

\$ 0

Test

<\$100,000

\$0.00

Range between \$0.00 and \$100,000.00

Under 100,000

Cost Recovery

\$0.00

View Account Variance

Cost Recovery

\$0.00

View Account Variance

inventors

\$0.00

60%

←

↓

Argentine, Bob

\$0.00

50%

← →

↑ ↓

Acosta, Mary

\$0.00

50%

← →

↑

>100000

\$0.00

→

Settings / Manage Distribution Schedule Templates

New Distribution Schedule Template

Template Name

Enter name...

 Copy Template Delete Save Cost Recovery ▾

Set up this new cost recovery

...

\$0.00

 Edit

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 Admin Fee ▾

% | Set up this new admin fee

...

\$0.00

 Edit

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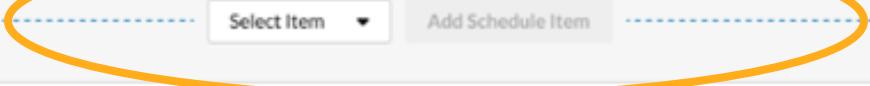
...

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 Select Item ▾ Add Schedule Item Range ▾

\$0.00 - \$0.00 | Set up this new range

...

\$0.00

 Edit

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...

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...

Template Test

Amount to test

\$0.00

 Test

Schedule Items

Range

 Range

Percent

 Percent Admin Fee Person Type Group Type Individual Person Individual Group

Cost Recovery

 Cost Recovery

Range

\$0.00 - \$0.00 | Set up this new range



\$0.00

Use this template item to set up a range that specifies how funds should be distributed. For example, if the first \$250k of revenue should be distributed in a different manner than the rest of revenue set this range item for \$0.00 - \$250,000.00 and only the items nested within the range will be distributed to, until the total distributed on the technology exceeds \$250,000.00.

Person Type

% | Set up new person type



\$0.00

Use this template item to set up the percentage of a distribution that should go to any particular person type. For example, if the primary inventors listed on the technology should receive 50%, select the "inventor - primary" person type and enter 50% into the percent field.

Group Type

% | Set up new group type



\$0.00

Use this template item to set up the percentage of a distribution that should go to any particular group. For example, if the primary college listed on the technology should receive 50%, select the "college - primary" group type and enter 50% into the percent field.

Group Type

% | Set up new group type



\$0.00

Use this template item to set up the percentage of a distribution that should go to any particular group. For example, if the primary college listed on the technology should receive 50%, select the "college - primary" group type and enter 50% into the percent field.

| | |
|--|-----------------------------------|
| | Person Type |
| | Group Type |
| | Individual Person |
| | Individual Group |
| | Cost Recovery |
| | Cost Recovery |



What's

- Next?

Three horizons

H1: late this release
Detailed design and development of features

H2: early this or next release
Select and conceptually design individual features to deliver those benefits

H3: next and later releases
Understand user and org needs and behavior, offer and select benefits

Three horizons

H1: late this release
Detailed design and development of features

H2: early this or next release
Select and conceptually design individual features to deliver those benefits

H3: next and later releases
Understand user and org needs and behavior, offer and select benefits

MORE

- Keep in touch with customer data sources (NPS, support contacts, usage data)
- Experiential success metrics for each product (“north star”)
- More direct user contact to learn about needs, personas, journey mapping

Three horizons

H1: late this release
Detailed design and development of features

H2: early this or next release
Select and conceptually design individual features to deliver those benefits

H3: next and later releases
Understand user and org needs and behavior, offer and select benefits

START

- Actually start making multiple rough concepts to evaluate with customers and product trio (we have generally not done this and it shows in experience quality)

Three horizons

H1: late this release
Detailed design and development of features

H2: early this or next release
Select and conceptually design individual features to deliver those benefits

H3: next and later releases
Understand user and org needs and behavior, offer and select benefits

IMPROVE

- More usability testing
- Solidify acceptance criteria division of labor
- Continuously improve and leverage design system/pattern library for accessibility, experience quality, and speed

Cayuse UX/UI Philosophy and Overview

Jon Plummer

Director, UX Design, Cayuse

Track 4

10/11/2022 @ 10:20am PT

Inspire • Modernize • Collaborate



Connect
by **cayuse**