

# 1.27.0 Portal Upgrade and Minor Configuration Release Items: September 2024

## Jump To

- [Cross-Suite Enhancements](#)
- [ESTR-IRB Enhancements](#)
- [Agreements-DUA Enhancements](#)
- [Data Safety Enhancements](#)
- [OAIR Enhancements](#)

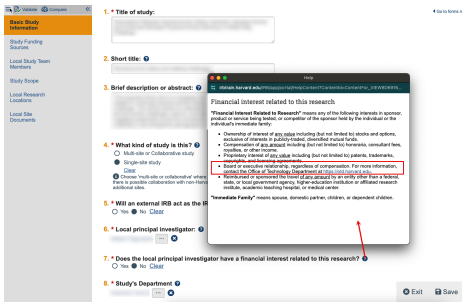
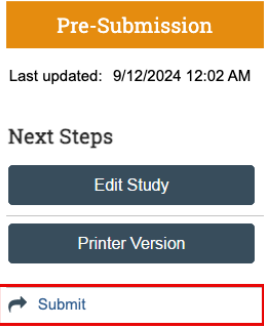
Icons below indicate the application(s) impacted by the enhancement.

 ESTR-IRB  Agreements-DUA  Data Safety  OAIR

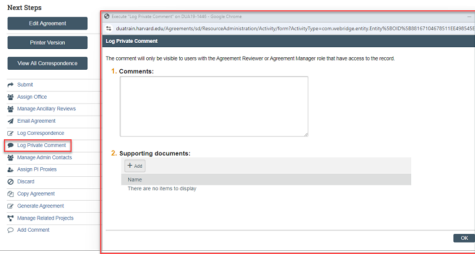
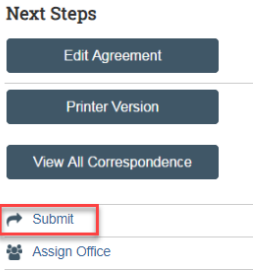
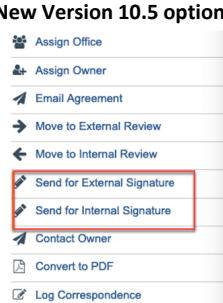
## Cross-Suite Enhancements

| What has changed...                                                                                                                                                                                                                                                          | What it means...                                                                                                                                                                                                                                                  | How it looks (as applicable) ... |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|
| <b>Huron Portal Upgrade</b>                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                   |                                  |
| Huron Portal Upgrade<br>   | This portal upgrade and configuration release includes minor changes to the ESTR-IRB, Agreements-DUA, Data Safety and OAIR SmartForms, along with small navigation improvements and enhanced activities and settings in ESTR-IRB, Agreements-DUA and Data Safety. |                                  |

- Commented [LL1]: Change to "Major Upgrade" ?
- Commented [HM2R1]: Yes, Mayor upgrade to 10.5 and minor release.

| What has changed...                                                                                                                                               | What it means...                                                                                                                                                                                                                                                                              | How it looks (as applicable) ...                                                     |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| <p><b>SmartForm</b></p> <p>An outdated URL was updated to route users to the Office of Technology &amp; Development on the Basic Study Information SmartForm.</p> | <p>When attesting to the question, “Does the local principal investigator have a financial interest related to this research?”the help text directs users to the appropriate URL for information regarding the Office of Technology Development, consistent with current policy guidance.</p> |   |
| <p><b>Submit</b> and <b>Submit Response</b> arrow customizations were reverted to Huron-delivered settings.</p>                                                   | <p>In any instance where the <b>Submit</b> arrow appears, it will no longer appear as red. With 1.27.0, the arrow will appear as blue.</p> <p>Language that referenced the red arrow was revised on all relevant SmartForms.</p>                                                              |  |

Agreements-DUA Enhancements

| What has changed...                                                                | What it means...                                                                                                                                                                                                 | How it looks (as applicable) ...                                                     |
|------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| <b>Activity</b>                                                                    |                                                                                                                                                                                                                  |                                                                                      |
| Create Log Private Comment activity.                                               | Log Private Comment activity enables users to add a private comment to the record history log. This activity and its resulting entries can only be viewed by Agreement Reviewers or Managers.                    |    |
| No longer customizing the red arrow on submit of applications.                     | “Submit” arrow is no longer red. Language that referenced the red arrow was revised on all relevant SmartForms.                                                                                                  |   |
| Language change for “Send Out for Signature” and “Route for Signature” activities. | Based on the Huron update, this activity update provides a more detailed description of the activity and its associated state set. An optional field has also been added to allow for additional entry comments. |  |

Send for External Signature

1. \* Contracting party:

If you cannot find the organization in the list above, enter its information here:

Contracting party name:

2. Contact name:

3. Contact e-mail:

4. Contact phone:

5. Comments:

Previous Version 10 options:

-  Assign Office

 Assign Owner

 Email Agreement

 Move to External Review

 Move to Internal Review

 Send Out for Signature

 Route for Signature

 Contact Owner

 Convert to PDF

 Log Correspondence

Data Safety Enhancements 

| What has changed...                                                                                                    | What it means...                                                                                                                                                                                                                                                                                                                                                         | How it looks (as applicable) ...                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| SmartForm                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>Submit</b> and <b>Submit Response</b> activity arrow customizations were reverted to Huron-delivered settings.      | <p>In any instance where the <b>Submit</b> arrow appears, it will no longer appear as red. With 1.27.0, the arrow will appear as blue.</p> <p>Language that referenced the red arrow was revised on all relevant SmartForms.</p>                                                                                                                                         | <p><b>View from prior version:</b></p> <div><div>Pre-Submission</div><div>Next Steps</div><div>Edit Protocol</div><div>Printer Version</div><div> Submit</div></div> <p><b>View from new version 10.5:</b></p> <div><div>Pre-Submission</div><div>Next Steps</div><div>Edit Protocol</div><div>Printer Version</div><div> Submit</div></div> |
| Known bug resolved on <b>Clarifications Requested</b> activity on a <b>Closure Request</b> with follow-on submissions. | <p>The PI and Proxy will be able to execute the Submit Response activity for Clarifications Requested by a Safety Specialist on a Closure Request. The act of requesting clarifications will no longer corrupt the submission. Site administrators will no longer intervene to administratively close the data safety submission on behalf of the Safety Specialist.</p> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |

| What has changed...                                                                                            | What it means...                                                                                                                                             | How it looks (as applicable) ...                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| A typo was corrected on the Add Ancillary Reviewer pop-up window on activity <b>Manage Ancillary Reviews</b> . | This change corrects a spelling error, for clarity and correctness. The typo will no longer appear when adding an ancillary reviewer to a Safety submission. | <div><b>View from prior version 10.0:</b><br/>Add Ancillary Review</div> <div><div>1. * Select either an organization or a person as reviewer:</div><div>Organization: <input type="text"/></div><div>Person: <input type="text"/></div></div> <div><div>2. Review type:</div><div><input type="text"/></div></div> <div><div>3. * Is a response required?</div><div><input type="radio"/> Yes <input type="radio"/> No <a href="#">Clear</a></div></div> <div><div>4. Comments for ancillary reviewer (appears on Data Info &amp; <b>Reviews</b> tab):</div><div><div></div></div></div> <div><b>View from new version 10.5:</b><br/>Add Ancillary Review</div> <div><div>1. * Select either an organization or a person as reviewer:</div><div>Organization: <input type="text"/></div><div>Person: <input type="text"/></div></div> <div><div>2. Review type:</div><div><input type="text"/></div></div> <div><div>3. * Is a response required?</div><div><input type="radio"/> Yes <input type="radio"/> No <a href="#">Clear</a></div></div> <div><div>4. Comments for ancillary reviewer (appears on Data Info &amp; <b>Reviews</b> tab):</div><div><div></div></div></div> |

Commented [k4]: Formatting issues - remove space

Commented [k3]: Katie to revise language before finalizing release notes

OAIR Enhancements

| What has changed...                                                                                                                                                                               | What it means...                                                                                                                                                                                                                                                                                                                   | How it looks (as applicable) ...                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| System Requirements                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Improved logic to address some of the issues that cause duplicate certificate creation.                                                                                                           | The “must disclose annually” logic will now exclude personnel whose end date on a project has passed, so a cert will not be created when it should not be.<br>In addition, people removed from the project team in GMAS ("deletes") will be automatically removed from the project personnel/team in OAIR and any certs withdrawn. |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| SmartForm                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| The “Talent recruitment or development program” category under the Professional Services or Employment SmartForm needs to be more visible and there needs to be a link to the policy information. | On the Professional Services or Employment SmartForm (under Disclosure Details) the “Talent recruitment or development program” category has been moved up to 4 <sup>th</sup> position from 8 <sup>th</sup> . In addition, a link has been added to that page with <a href="#">policy information</a> .                            | <div><div>Professional Services or Employment</div><div>Additional Disclosure Information</div></div> <div>Professional services and employment include any paid or unpaid professional activities undertaken for this org. For more information about the service and activity types listed below, see <a href="#">Definitions and Terms</a>. For more information about participating in Foreign Talent Recruitment Programs, see <a href="#">University Policy</a>.</div> <div>1. * Category of professional service or activity (mark all that apply, at least one)</div> <div><div><input type="checkbox"/> Research or teaching appointment</div><div><input type="checkbox"/> Employment</div><div><input type="checkbox"/> Executive employment</div><div><input checked="" type="checkbox"/> Talent recruitment or development program</div><div><input type="checkbox"/> Consulting</div><div><input type="checkbox"/> Membership on a scientific or other advisory board</div><div><input type="checkbox"/> Office in professional organization</div><div><input type="checkbox"/> Non-US government services (including testimony)</div></div> |