



UTRMS System Upgrade Notes

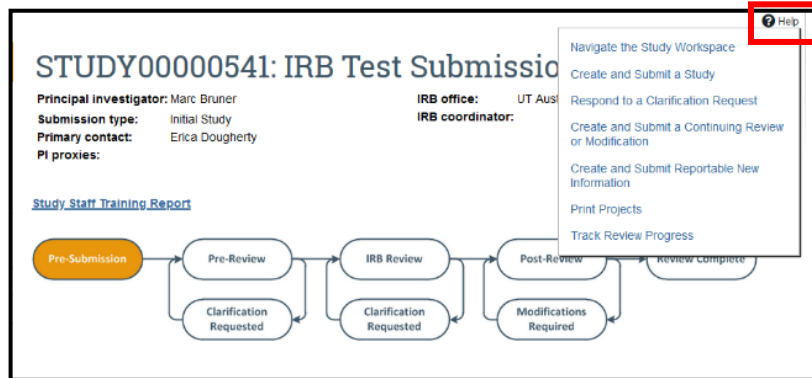
System Version: Huron Research Suite 10.0
Live date: September 24, 2021

New Features/Enhancements

Across the Suite

- Addition of ALT tags to the images in user guides for ADA compliance. (User guides may be found in the Help Center section of each module.)

- Embedded help topics and videos are now available. Click the Help button in the top right corner to access all help topics for the individual record or module that you're in.



- Personalized data displays - Users can control what they deem to be important on data display tables. Click the gear icon to reorder or hide specific fields or export the table to CSV. The settings will be saved even after you log out.

Personalized Data Displays

What Can I Control?

IRB	Date Modified	State	PI First Name	PI Last Name	Coordinator First Name
H IRB pSite	10/5/2020 1:44 PM	Updating Study	Rebecca	Simms (pi)	Orlando
	10/12/2020 12:34 AM	Updating Study	System	Administrator	
jj 10/2/2020	10/2/2020 2:56 PM	Pending sIRB Review	Phil	Bivens (pi2)	
Test psite	10/12/2020 12:30 AM	Pre-Submission	System	Administrator	
08252020	10/13/2020 10:24 AM	Pre-Submission	Penelope	Neiland (pi9)	Inez
SU	8/20/2020 1:57 PM	External IRB	Penelope	Neiland (pi9)	Inez
CS SU	8/20/2020 1:40 PM	Active	Penelope	Neiland (pi9)	Inez
	8/23/2020 11:34 PM	Pre-Submission	System	Administrator	
	8/25/2020	Active	Penelope	Neiland (pi9)	Inez

Personalization is not possible on data tables with no gear icon

Personalize Table

Displayed Fields

Field	Order
<input checked="" type="checkbox"/> getIconAsLink	↑ ↓
<input checked="" type="checkbox"/> ID 1	↑ ↓ 2
<input checked="" type="checkbox"/> Name	↑ ↓
<input checked="" type="checkbox"/> Date Modified	↑ ↓
<input checked="" type="checkbox"/> State	↑ ↓
<input checked="" type="checkbox"/> PI First Name	↑ ↓
<input checked="" type="checkbox"/> PI Last Name	↑ ↓
<input checked="" type="checkbox"/> Coordinator First Name	↑ ↓
<input checked="" type="checkbox"/> Coordinator Last Name	↑ ↓
<input checked="" type="checkbox"/> External IRB	↑ ↓
<input checked="" type="checkbox"/> External Study ID	↑ ↓

Options

Place the paging bar at: **Bottom** **3**

Enable Auto-Refresh: **4**

Refresh Data Every: 60 seconds

Export to CSV **5**

OK **Cancel** **Reset to Default** **6**

- 1. Displayed Fields:** To hide (or show) a given field, click its check box.
- 2. Order:** To reorder the columns, click the up and down arrows accordingly.
- 3. Paging Bar:** To personalize the location of the paging bar, select **Top**, **Bottom** or **Top & Bottom**.
- 4. Auto-Refresh:** Click the **Enable Auto-Refresh** check box and specify a refresh interval (in seconds) to auto-refresh the data. If you elect to not auto-refresh, data refreshes with the next page action (e.g., tab click).
- 5. Export to CSV:** Click this button to view data in Excel. The export honors currently displayed fields, sort order, and filters.
- 6. Reset to Default:** Click this button to revert to the default settings for the data list.



Agreements

- Renamed the report *Agreements by submitter* to *Agreements by manager/PI*.
 - The *Submitted By* column has been split in two, *Manager/PI First Name* and *Manager/PI Last Name*. This allows for sorting and filtering by first or last name, and makes the report name and column headers more accurate.
- Renamed the report *Agreements by primary sponsor* to *Agreements by contracting party*
- Documents uploaded to a record via the Email Catcher now set version history, and reflect changes in the name of the document when a revision is uploaded later.
- Record workspace updates:
 - *Supporting Documents* section has been removed from the workspace summary.
- Agreements Global Search in place on the Agreements landing page.

Agreements can be searched by the below-mentioned attributes:

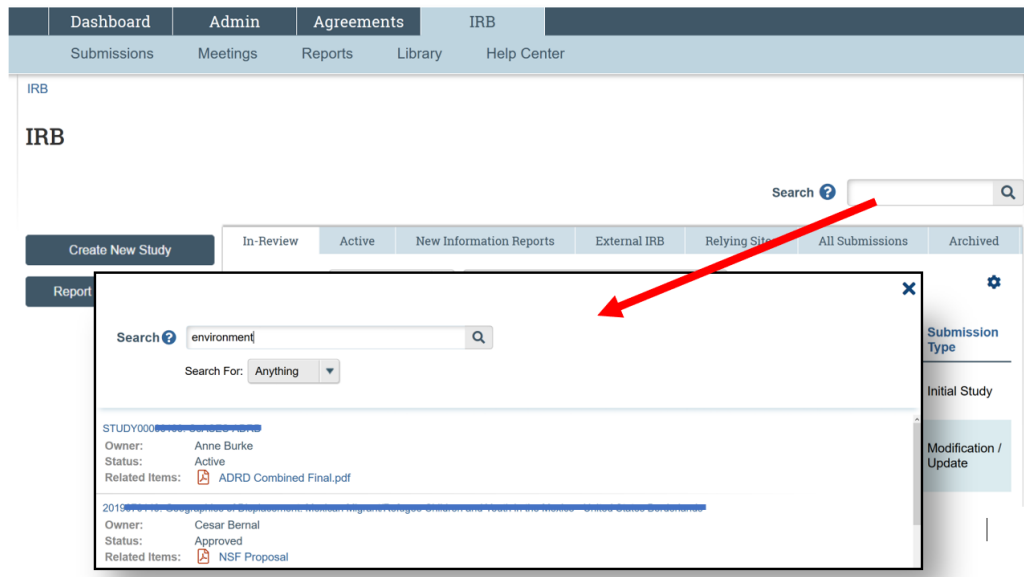
- Agreement ID
- Name Agreement Type (Acronym)
- Agreement Type (Name)
- Description
- Amendment Description
- Agreement File (Draft and Final)
- Supporting Documents
- Contracting Party (Organization name, Contact name)
- Principal Investigator (First Name, Last Name)
- Agreement Creator (First Name, Last Name)
- Created By (First Name, Last Name)



Collaborators (First Name, Last Name)
Correspondence - Summary
Correspondence - Notes Type
MTA Material Info (Name Type, Origin, Properties, Hazardous Agents, Human Material Type, Received Type)
MTA Export Control (Export Info, ITAR Munitions List, EAR Export Control Classification Number (ECCN))

IRB

- IRB Site Search in place on IRB landing page-
This allows IRB Submission projects, pages and documents to be indexed for searching. The site search index for an IRB Submission will be updated every time there is a state transition, activity run or view saved. Results are displayed in order of relevance (e.g. number of times key word(s) appear in project data) and display only records that the user has permission to view.



IRB can be searched by below-mentioned attributes:

Study ID
Full Study Title
Name
Description
Investigator
Investigator Employer Name
Protocol Documents
Funding Sources (Organization Name, Funding Source ID, Grants Office ID, Attachments)
Study Team Members
Research Locations



Drugs (Name, Attachments, IND Number, Other Attachments)
Devices (Name, Attachments, IDE/HDE Number, Other Attachments)
Study Related Documents (Consent, Recruitment Materials, Other attachments)
Local Site Documents (Consent, Recruitment Materials, Other attachments)
Assigned IRB Coordinator
PI Proxy
Primary Contact
Assigned Reviewer
Committee (Name)
Related Grant (ID and Grant Title)
Regulatory Oversight
Submission Type
Designated Reviewer
External IRB (Name of External IRB Organization)
External Study ID
Brief Description of Activities Site will Perform
Add'l Local Funding Source (Name, Sponsor Funding ID, Attachments)
Continuing Review Supporting Documents
Summary of Modification
RNI Brief description
RNI Related studies and modifications (ID and name)
RNI Attach files containing supporting information
RNI Reported by (full name)

System Fixes

Agreements

- Removed the ability to edit agreements in the *Terminated* state.
- Removed the ability to edit agreements in the *Discarded* state.
- Removed the ability to execute the *Convert to PDF* activity while in the *Active* state.
- Resolved an issue which caused workflow map to disappear from the agreements workspace while a modification is in the *Approved* state.
- The In Progress tab now shows agreements which are in *Routing for Signature* state.
- Log Correspondence on the parent agreement no longer copies over to the amendment.
- Change of contracting party will be reflected in the parent agreement records when the contracting party is changed via an approved amendment. (Also updated in the General Information Smartform and Contact tab of agreement workspace.)
- Collaborators added to an agreement via amendment will be copied to the parent agreement when the amendment is approved.

IRB

System fixes for IRB include mostly “behind the scenes” bug fixes for this upgrade.