HURON

Huron Agreements

Researcher's Guide

October 2022

Table of Contents

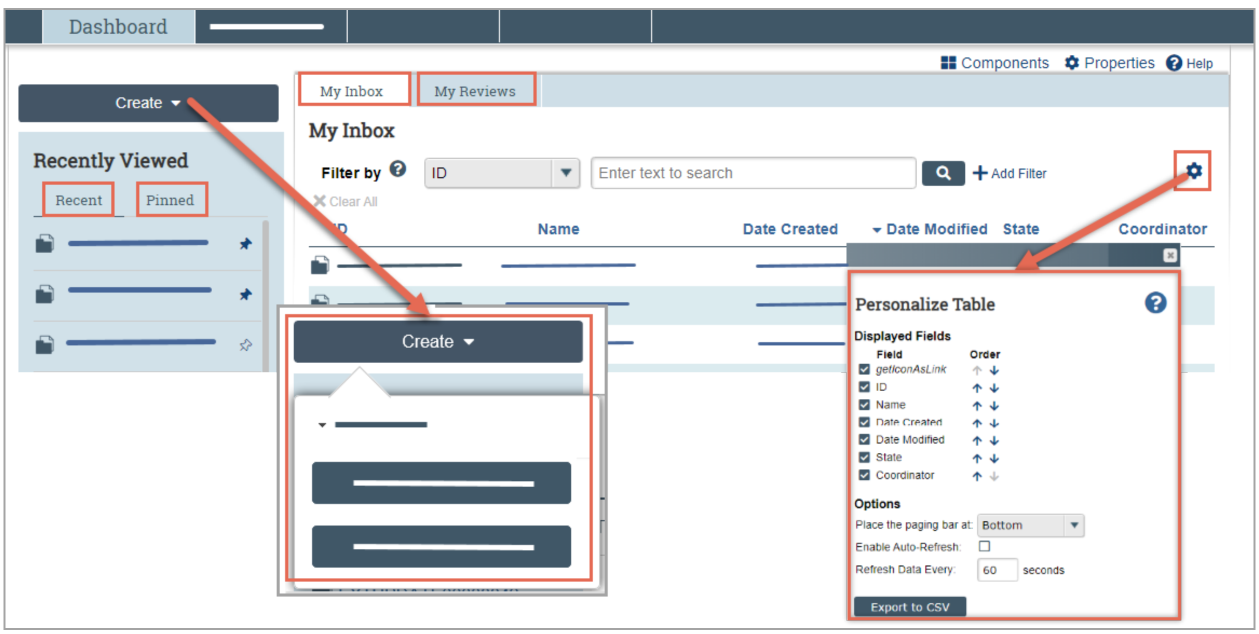
Navigation and Basic Tasks

This section explains where to go to perform basic actions on an agreement.

To find key items

From your Dashboard, you will see:

- **My Inbox:** Items that require you to take action.
- **My Reviews:** Items assigned to you to review. These are a subset of the items in My Inbox.
- **Create menu and buttons:** Actions you can perform. The menu will not show if you do not have access to any buttons.
- **Recently Viewed:**
  - **Recent**:The last several items you viewed. Scroll through this list to find an item you worked on recently.
  - **Pinned:** You can pin the items in Recently Viewed section for quick and easy access. This is where those pinned items are listed.
- **Personalize Table:** You can alter the tables displayed on the dashboard by using the Personalize Table gear icon.



To take or assign ownership

1. In the Top Navigator, click **Agreements**.
2. Click the **Unassigned** tab.
3. Open the agreement you want to assign owner for.
4. On the left, click **Assign Owner**.
5. Select the owner from the available list.
6. Add any notes or attachments, if required.
7. Click the **OK** button.

The agreement will appear in the owner's inbox (My Inbox) whenever reviewer action is required.

To open an agreement

1. From My Inbox, click the agreement name.
   Alternatively, if the agreement is not in your inbox, click **Agreements** in the Top Navigator and locate the agreement on one of the tabs (All Agreements, Unassigned, etc.)

To view the current status

1. From the agreement workspace, see the status on the top left.

To take action on the agreement

1. From the agreement workspace, click the appropriate activity link on the left.

To view agreement history

1. From the agreement workspace, click the **History** tab.

Create and Submit an Agreement

When you create an agreement, you are required to complete a series of pages. The number of pages depends on the type of review required.

To create an agreement

1. From the Dashboard, click the **Create** menu and then select **Create Agreement**.
2. Complete the pages. To move to the next page, click **Continue**.
3. On the last page, click **Finish**.
   The workspace of the created agreement displays.

> **Tip:** You can click the **History** tab from the agreement workspace to view who created the agreement.

Note: You can continue to edit the agreement until you submit it for processing.

To submit an agreement

1. Check if all the information is accurate and complete.
2. At the left of the workspace, click **Submit**.
3. Click **OK** to accept the statement and submit the agreement.

> **Tip:** You can click the **History** tab from the agreement workspace to view who submitted the agreement.

Note: By default, the person who creates an agreement is assigned as the Primary Contact in the system. The Primary Contact can be changed, and if that happens, the person who creates the agreement will:

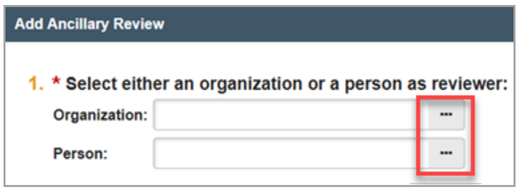
- see the agreement in My Inbox only during the Pre-Submission state.
- no longer have read and write permissions on that agreement.
- not be able to create amendments for the agreement.

Assign an Ancillary Reviewer

You can add an organization or a person as an ancillary reviewer until you submit the agreement. Ancillary reviewers can be any registered user in the system, for example, someone from the Principal Investigator's (PI) department or a person in another agreement office.

To assign an ancillary reviewer

1. In the Top Navigator, click **Agreements**.
2. From the **All Agreements** tab, click the agreement name to open it.
3. On the left, click **Manage Ancillary Reviewers**.
4. Click **Add**.
5. Next to Organization or Person field, click the ellipsis and then choose the specific organization or person, and then click **OK**.



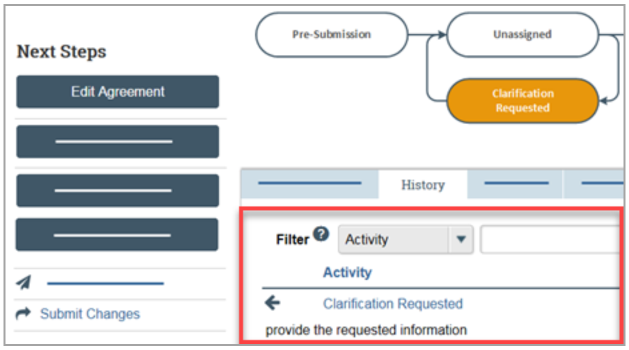
6. Complete the rest of the form and click **OK**.
7. To add more reviewers, click **OK and Add Another** and repeat the steps 5 and 6.
8. When done, click **OK**.
   The details of the created ancillary review display in the **Ancillary Reviews** tab on the agreement workspace.

Respond to a Clarification Request

If a reviewer has questions or requires you to change your submission, you will receive an e-mail notification indicating this. Review the request details and then respond to the request.

To respond to a clarification request

1. From My Inbox, click the agreement name to open it.
2. Click the **History** tab.
3. Look for the **Clarification Requested** activity and review any reviewer comments.



4. If required, click **Edit Agreement** on the left and make the changes.
   Note: You can enter a response for the reviewer before submitting the agreement.
5. Click **Submit Changes**.
   Note: In case you have changed the agreement type, make sure to complete the related pages of the agreement type in the SmartForm. In case you miss filling out the pages or mandatory entries then the system will validate and throw an error message. Only when the validation is approved, you can go ahead and submit the change.
6. In the Notes box, type a response to the reviewer's comments or questions.
7. Click **OK**.

Create and Submit an Amendment

You can create amendments for agreement in the Active, Expired, and Evergreen state. Only one amendment can be in progress at a time.

Note: You can add or replace Primary Contact and collaborators for an agreement without creating an amendment. This can be done through **Manage Access** activity from the parent agreement workspace. See, To change or add Primary Contact or collaborators in an agreement.

To create and submit an amendment

1. In the Top Navigator, click **Agreements**.
2. On the **All Agreements** tab, click the name of the agreement to amend.
3. At the left of the workspace, click **Create Amendment**.
4. Make necessary changes, add an amendment document and other supporting documents if required. Click **Continue** to move to the next page, or use the left navigator to jump to a specific page.
   Note: Primary Contact has the same edit rights to the amendment as the Agreement Manager or Principal Investigator (PI).
5. When satisfied with your changes, click **Save**, and then **Exit**.
6. At the left of the workspace, click **Submit** to submit the amendment for review.
7. Click **OK** to confirm the amendment is complete and correct.

Notes:

- You can view the amendment workspace from the parent agreement by clicking the **Go to Amendment** button.
- From the parent agreement workspace, you can find information about related amendments under:
  - **Amendments tab:** Displays list of amendments initiated for the agreement along with its ID, description, state, and final amendment document link (if any).
  - **Documents tab:** Displays name and IDs of the agreement project along with the list of final agreement and amendment files and any supporting documents (in ascending alphabetical order) uploaded in the parent agreement and amendments.
- You can click the **History** tab from the amendment workspace to view who created and submitted the amendment along with activity date and time.

Manage Access

You can add or replace a Primary Contact or collaborator(s) in an agreement in any state without going through the amendment process. This action is done through Manage Access activity which can be executed only in the parent agreement by the following users:

- Agreement Office Staff
- PI/Manager
- Primary Contact
- Collaborators
- Organization-based Admin Editors

To add or replace Primary Contact or collaborators in an agreement

1. In the Top Navigator, click **Agreements**.
2. From the **All Agreements** tab, click the agreement name to open it.
3. On the left, click **Manage Access**.
4. To add or replace a primary contact, next to the Primary contact field, click the ellipsis and select a primary contact, and then click **OK**.
5. To add one or more collaborators, next to the Agreements collaborators field, click the ellipsis and select the collaborator(s) and then click **OK.**
6. When done, click **OK.**
   Note: The changes made through this activity will immediately reflect in the parent agreement and as well as in the related amendments.

Search Your Solution

To help you work more efficiently, you can use search to locate a wide range of information in your solution. You can search for project data, documents, or content from specific pages on your site. The search results appear in a secondary window and display only those items you have permission to view. Results are ranked to show items where the search term is most prevalent at the top.

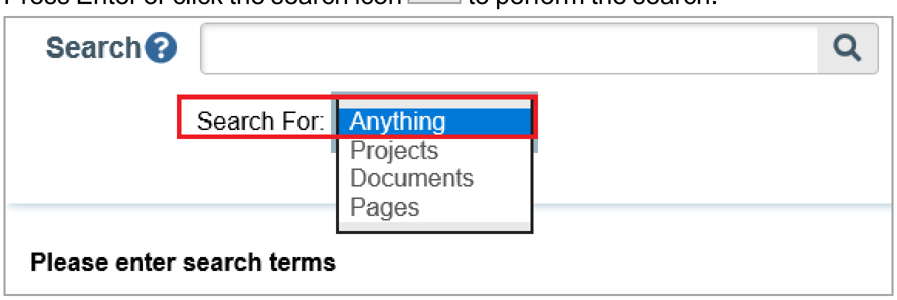
After your initial search, you can further refine results using the following filter options:

- **Projects**— Projects are the day-to-day items you use to manage your research in a Huron solution. They include items such as funding proposals, studies, protocols, agreements, and disclosures. You can search for any project in your solution using properties on the project, including its name, ID, and description. Depending on the solution, other properties are also available to search. When you select the Projects filter, the system will only display results that match search criteria in your project data.
- **Documents**— Documents are third-party files uploaded to your solution outside the context of a project. When you select the Documents filter, the system will only display results that match search criteria from documents. The search includes metadata on a document, such as its name and description. It also includes the contents of a document. From the results, you can click directly on the provided link to open a document.
- **Pages**— Pages organize information on your site into a hierarchy that you can use to view and manage your work. The Pages filter provides a way for you to search one type of page within your solution - content pages. Content pages are presented outside the context of a project. They supply supporting information for your solution, such as the Help Center, Reports, and Meetings. Dashboards and project workspaces are not included with this filter.

Note: Content on the site is updated periodically. If you are searching for something you just added, results might not be available immediately. Try your search again at another time.

To search your solution

1. In the Top Navigator, click **Agreements**.
2. In the **Search** box, type your search criteria. You can use the following operators:
   - **And**: Finds all the specified words.
   - **Or**: Finds at least one of the specified words.
   - **Not**: Excludes the specified word. You cannot start a search with the Not operator.
   - **Quotation marks**: Finds the exact phrase.
3. Press Enter or click the search icon  to perform the search.

   The search results appear.
4. Click the **Search For** arrow to apply filter of your choice.

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