

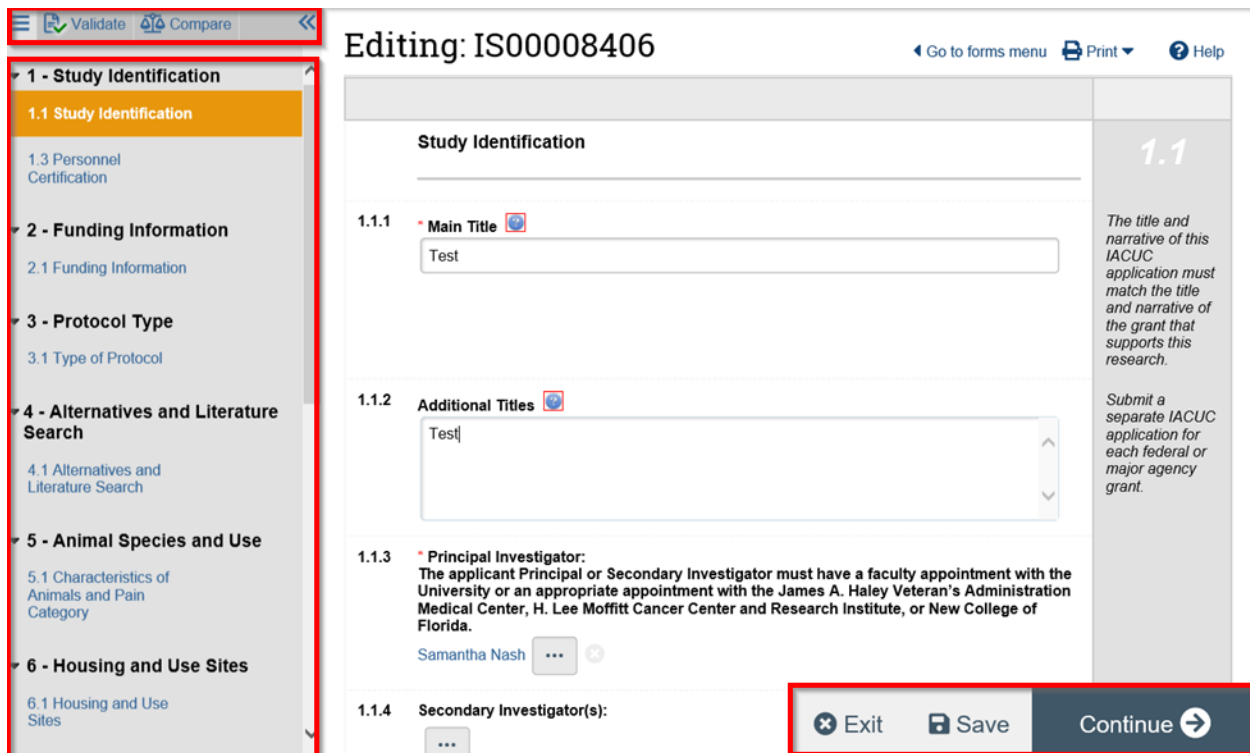
## Portal 9 Overview

Applications for Research Compliance (ARC) is USF’s implementation of Huron Portal, a platform for research process automation. Huron releases periodic upgrades to this platform to offer continuous improvement of system performance, security, and usability. The ARC Portal Team is planning an upgrade to version 9.0 in April 2021. This update will introduce changes to SmartForm navigation, the reviewer experience, and the user interface. This document provides an overview of some of the more noticeable changes that will impact ARC users.

## SmartForm Improvements: Look and Feel

The SmartForm has undergone a complete overhaul in Portal 9. Major changes include:

- Left Side Navigational pane which replaces:
  1. The “Jump-to” SmartForm navigation
  2. Integrates “View Differences” as “Compare”
  3. Integrates “Hide/Show Errors” as “Validate”
- SmartForm navigation buttons like “Exit”, “Save”, and “Continue” are now more obvious and stay visible at all times in the bottom right corner of the page.



Other SmartForm UI improvements include:

- Replace pop-ups for selections, document uploads, and table entries with slide-in windows
- “Welcome back” feature which returns users to where they previously exited the SmartForm
- A single page, scrollable read-only mode.


## Reviewer Experience

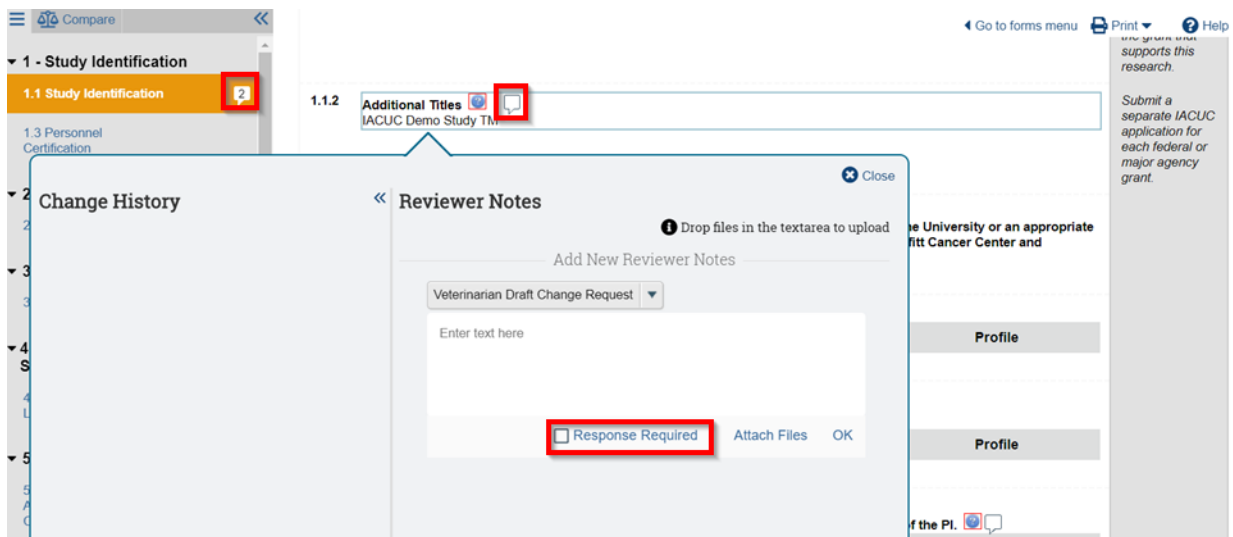
Along with the SmartForm changes, the Reviewer Experience has been completely overhauled as well.

### Reviewer Notes

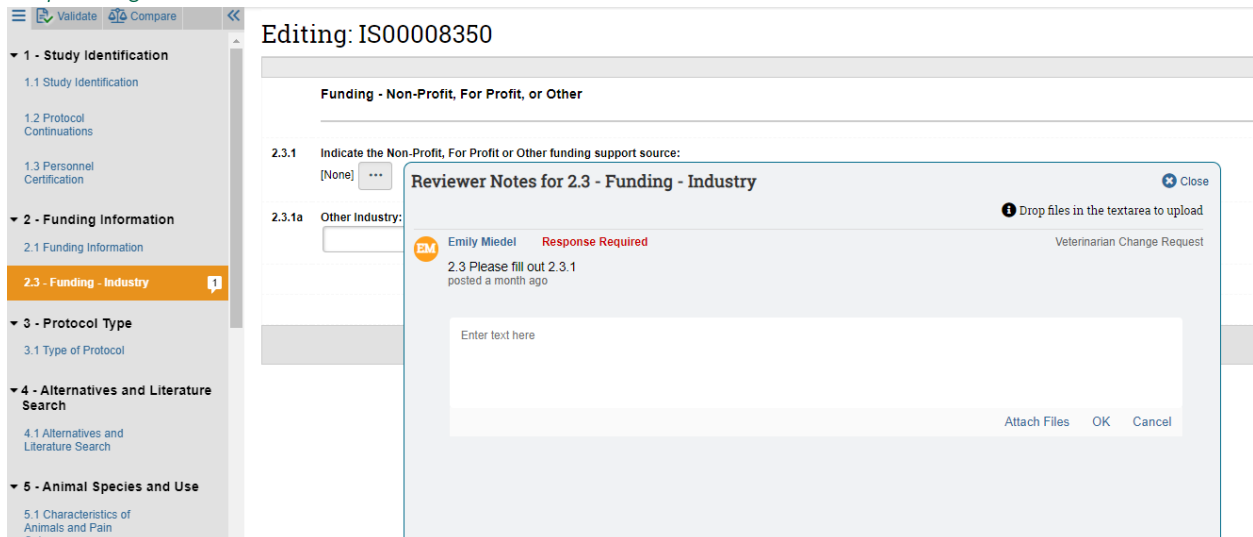
Portal 9 supports a much richer Reviewer Notes experience, with the ability to place notes at page-level and field-level. The Reviewer Notes component has also undergone a change to make it read only, searchable, and printable.

#### Leaving Reviewer Notes:

Reviewer Notes can be added by selecting the  icon at either the top of the page or next to a SmartForm question. Reviewer notes can be marked as “Response Required” on a per note basis. Reviewer Notes have new indicators on the left side navigational panel which indicate a number of notes on that page. Page-level notes will appear at the top right corner of the page. Icons next to individual questions represent field-level notes. Existing Reviewer Notes will be migrated over as Page-level after the Portal 9 upgrade.



#### Responding to Reviewer Notes:




## ARC Portal 9 Upgrade Overview

### Reviewer Note Threads:

Reviewer Notes are now presented as threaded discussions. The Research team and the Reviewer can have a back and forth conversation instead of creating new Reviewer Notes.

The screenshot shows a threaded discussion titled "Reviewer notes for Funding Sources". At the top, there is a "Close" button and a notification "Drop files in the textarea to upload". The thread starts with a note from Jim Markosi (iacucc) with a "Response Required" status, asking for clarification on Q6. This is followed by a note from Tiana Racliffe (vet) providing instructions and attaching a document "IACUC Protocol Guidelines.txt". Below that, Martin Vine (pi2) asks for clarification on lines 4-7 in Section B. Finally, Tiana Racliffe (vet) posts a placeholder text block.

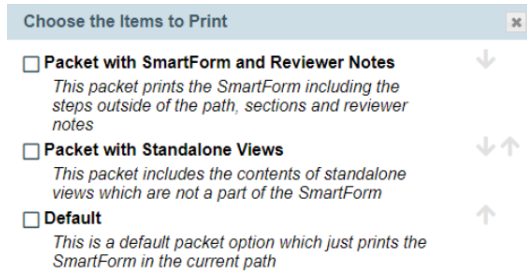
### View Differences Overhaul

Finally, a vital part of the Reviewer Experience is the "View Differences" capability that allows a reviewer to see what was changed. This functionality is now integrated directly into the SmartForm so the reviewer can see the changes in the same context as they were made. The changed data can also be seen on the field-level Reviewer Notes. Pages with a  indicate changes have been made.

The screenshot displays the "View Differences" interface. On the left, a sidebar shows a "Compare" button and a list of versions (0.5 and 0.4) with a "Changes found on 2 steps:" section. The main content area shows the "Funding Information" section of a form. Questions 2.1.1 through 2.1.4 are visible. A red box highlights a reviewer note for question 2.1.4, showing the user "Rebecca Simms (PI)", the modification time, the version number, and the "Old Value" which is "no".

## Print Packets

Print Packets significantly improve the printing experience by allowing users to print the SmartForm with more control over what goes into the final printing. The user can decide which packets to include and what order to put them in. Portal provides some preconfigured packets and more can be created through configuration. The Print Packets can be launched from the SmartForm or Workspace.



## Feedback and Questions

If you have any questions or feedback related to the upgrade, please contact the ARC Help Desk at [RSCH-ARC@usf.edu](mailto:RSCH-ARC@usf.edu) or 813.974.2880.