FSU RESEARCH
Advancing Creativity and Innovation

1 PURPOSE

1.1 This procedure establishes the process for communicating and documenting support cases related to FSU's Research Administration Management Portal (RAMP) IRB module.

2 REVISIONS FROM PREVIOUS VERSION

2.1 None.

3 POLICY

3.1 Effective June 1, 2020, the primary Point of Contact (POC) for FSU RAMP IRB module support cases is the FSU RAMP Support Director.

3.2 Primary responsibility for communicating and documenting RAMP IRB support cases with Huron regarding issues or required services that are identified by OHSP staff, IRB members, or other end-users rests with the RAMP Support Director. The RAMP Support Director uses the Huron Support Case System to communicate and document support cases throughout the life cycle of the case.

3.3 Decision-points for RAMP IRB module work are communicated to the OHSP Director for any required authorizations or notice prior to any RAMP IRB module system upgrades, updates, fixes, downtime, and/or other changes to be implemented.

3.4 This procedure begins when a RAMP IRB-related issue or required service is identified.

3.5 This procedure ends when the identified issue is resolved or when the required service is completed and the related support case is closed.

4 RESPONSIBILITIES

4.1 The RAMP Support Director will carry out these procedures.

5 PROCEDURE

5.1 Once OHSP staff, IRB members, or other end-users identify a system issue or services required, the issue or service request would be immediately reported to the RAMP Support Director for handling. Issue reports and service requests will be conveyed by way of email for documentation purposes.

　5.1.1 Upon receiving the issue report or service request, the RAMP Support Director will determine whether or not there is sufficient information (i.e., impact to IRB workflow, details on the nature of the problem, steps to reproduce the problem, and screenshots if the problem is able to be captured) to submit the issue into the Huron Support Case System.

　　5.1.1.1 If the RAMP Support Director determines there is not sufficient information to submit the issue to Huron, clarification will be promptly requested from the issue reporter.

　　5.1.1.2 When the necessary information has been compiled, the RAMP Support Director will submit the issue into the Huron Support Case System (see Reference 7.2).

　5.1.2 The RAMP Support Director will begin by completing the Basic Information page of the Support Case SmartForm, beginning with a short description of the issue to be used as the title of the support case (see Reference 7.3).

　　5.1.2.1 The title will begin with "RAMP IRB" in order to maintain consistent nomenclature to assist with distinguishing IRB-related issues in Huron's Support Case System.

　5.1.3 The RAMP Support Director will then select the appropriate request type and priority level, defined as the following:

　　5.1.3.1 Request type:

　　　5.1.3.1.1 Problem Report – Requesting any non-configuration related problem/issue

5.1.3.1.2   Enhancement Request – Requesting a modification to a Click (Huron) product application

        5.1.3.1.2.1   Note: The Huron User Group community must vote upon Enhancement requests before they can qualify to appear in a system upgrade or update.

5.1.3.1.3   Hosting Request/Issue – Requesting that the Huron Hosting team perform an action (i.e. apply a patch)

        5.1.3.1.3.1   Note: This request type is only to be used by Huron after they have evaluated an FSU Problem Report or Services Request and have determined that the problem or service should be routed to Huron Hosting.

5.1.3.1.4   Services Request – Requesting assistance from services for configuration/workflow enhancements

        5.1.3.1.4.1   Note: Many of the service requests that have been submitted for the current implementation will no longer require service requests upon implementation of the IRB 9.1 upgrade due to Huron's relinquishing of many of the IRB settings and data management capabilities.

5.1.3.2   Priority Level:

    5.1.3.2.1   Priority Level 1 – Site Down

        5.1.3.2.1.1   Note: Priority Level 1 is strictly reserved for system outages (i.e. the RAMP site or one of the RAMP modules cannot be accessed) and requires contacting the Huron Client Support team at (503) 748-3930 upon submitting the problem report to bring this to Huron's attention as soon as possible.

    5.1.3.2.2   Priority Level 2 – Critical Functional Issue

        5.1.3.2.2.1   Note: Priority Level 2 is intended for issues or services required which represent workflow-stoppage issues or are otherwise determined by the OHSP to be of critical importance.

    5.1.3.2.3   Priority Level 3 – Non-Critical Functional Issue

        5.1.3.2.3.1   Note: Priority Level 3 is intended for issues or services required that are not of critical importance and that do not adversely or significantly impact the functioning of the IRB system.

    5.1.3.2.4   Priority Level 4 – Cosmetic Issue

        5.1.3.2.4.1   Note: Priority Level 4 is intended for minor cosmetic issues that are not of critical importance and that do not impact the functioning of the IRB system.

5.1.4   Once the Basic Information page of the Support Case SmartForm has been completed, the RAMP Support Director continues to the next page where they will identify the site impacted, the application version, the portal version, the contacts who

should be on the case to receive notifications, and provide information on the problem or services required.

5.1.4.1   The RAMP Support Director should evaluate issues on a case-by-case basis, however, generally the below information will be provided (see Reference 7.4 for a completed case example):

5.1.4.1.1   Site Impacted: When selecting the site impacted, the RAMP Support Director will always select "Florida State University IRB Production" for submitting support cases for the RAMP IRB module.

5.1.4.1.2   Application version: When selecting the application version, the RAMP Support Director will need to ensure the correct version of the software currently implemented in FSU IRB Production is selected (i.e., FSU IRB Production will function on version Huron IRB 9.0.1, however this may change after subsequent upgrades or other changes are complete).

5.1.4.1.3   Portal version: The portal version will be listed next to the application version when making the above selection. The RAMP Support Director should select the portal version that corresponds to the current application version.

5.1.4.1.4   Description of the issue: The RAMP Support Director should provide as much detail as possible to clearly describe the problem or services required when completing the support case description using the information gathered in step 5.1.1.

5.1.4.1.5   Steps to reproduce: The RAMP Support Director should list the steps needed to reproduce the issue so Huron Client Support may determine what work will be required to find a resolution.

5.1.4.1.6   Documents: The RAMP Support Director should attach any supporting documents or screenshots in the document upload section. These may be managed throughout the life cycle of the case by clicking the "Manage Attachments" activity on the support case workspace (see Reference 7.4).

5.1.4.1.7   Case contacts: The RAMP Support Director is the Main Client Contact for the case unless the RAMP Support Director modifies this. The OHSP Director should be listed as an additional case contact. Any additional FSU contacts (if applicable) that may need to receive notifications of updates related to the specific case should be added in this section (see Reference 7.4).

5.1.4.2   Once the required information has been provided, the RAMP Support Director will submit the support case and will receive an email notification documenting the submission of the new support case (see Reference 7.5).

5.1.4.2.1   The RAMP Support Director should take note of the support case ID number assigned or otherwise file the email notification in a location where it can be readily accessible for documentation and follow-up purposes.

5.1.5   As the support case is under review in the Huron Support Case System, a notification will be delivered to all contacts listed on the support case (selected in step 5.1.4.1.6) confirming Huron's acknowledgement of the case (see Reference 7.6).

5.1.5.1   Huron will assign one of their representatives as the "Owner" of the case and this will be noted in the acknowledgement notification. Note: Huron

may update the owner of the case as they evaluate the work needed in order to find a resolution.

5.1.5.2   Any further updates from Huron will be conveyed by way of comments on the support case, which will trigger an email notification to be delivered to the Main Client Contact and any additional applicable contacts on the case.

5.1.5.2.1   Note: Email notifications may be manually turned on/off for comments on support cases. You must click on the "Comment Posted" activity in order to see exactly who received an email notification for a given comment.

5.1.5.3   Any updates that may represent critical decision-points, as noted in step 3.3, will be promptly forwarded to the OHSP Director for authorization prior to authorizing any work needed on RAMP IRB.

5.1.6   Once a resolution has been provided for a support case, the RAMP Support Director will forward the resolution to the OHSP Director or designate for validation.

5.1.6.1   Once the OHSP team validates a resolution and determines the problem has been resolved or services requested have been fulfilled, the OHSP will provide this confirmation to the RAMP Support Director by email for documentation purposes.

5.1.6.2   When the issue is confirmed to be resolved, the RAMP Support Director will note this in a comment on the case, which will allow Huron to document the successful resolution and close the support case (see Reference 7.7).

6   MATERIALS
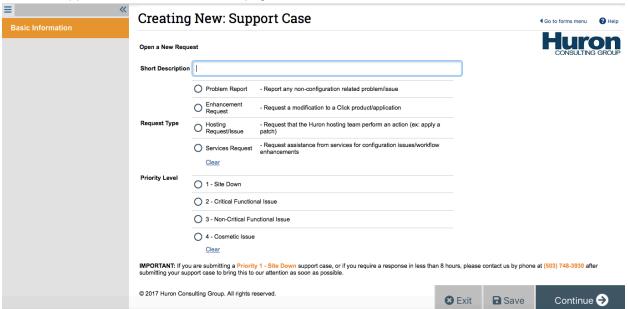
6.1   N/A

7   REFERENCES

7.1   "Huron Client Services" PowerPoint provided by Huron Consulting Group
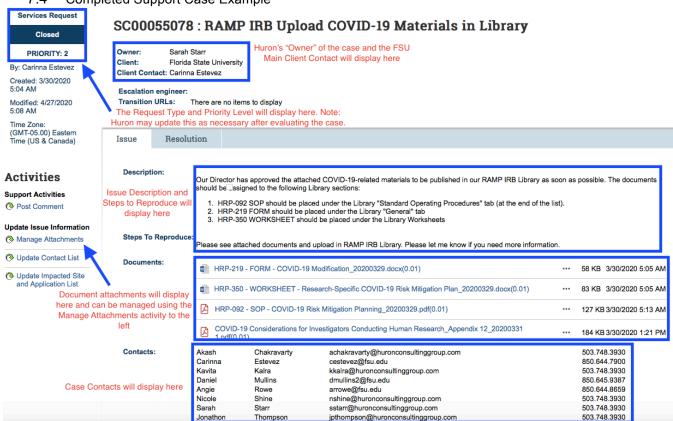
7.2   Submit New Issue

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SOP: RAMP IRB Support Case Program				
NUMBER	DATE	AUTHOR	APPROVED BY	PAGE
HRP-066	06/01/2020	C. Estevez	D. Mullins	5 of 7

7.3 Support Case Basic Information page
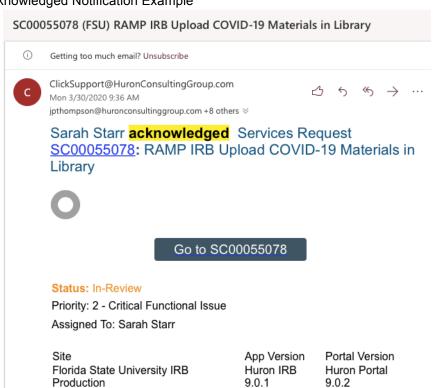

7.4 Completed Support Case Example

7.5 New Support Case Notification Example

7.6 Acknowledged Notification Example

7.7   Closed Case Notification Example

SC00055647 (FSU) RAMP IRB is Down

C ClickSupport@HuronConsultingGroup.com
Thu 4/23/2020 12:24 PM
jpthompson@huronconsultinggroup.com +10 others ⌄

Gavin Silaski **closed** SC00055647: RAMP IRB is Down

Regarding: Huron IRB 9.0.1

> Resolution:
>
> Issue resolved, RCA document provided to FSU.
>
> Comments:

Go to SC00055647

Status: Closed
Priority: 3 - Non-Critical Functional Issue
Assigned To: Gavin Silaski

Site	App Version	Portal Version
Florida State University IRB Production	Huron IRB 9.0.1	Huron Portal 9.0.2