



## ALL APPLICABLE MODULES

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*Analyst Dashboard*

Software Version: 13.01

Manual Version: P1

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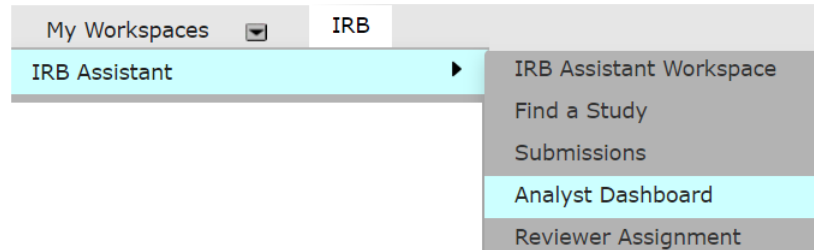
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## Introduction

This manual describes processing functions accessed via the **Analyst Dashboard** menu item in review board modules (e.g., IRB, IACUC, etc.).




Note that while the screenshots shown in this manual are from specific iRIS™ modules (e.g., COI, IRB, etc.), Analyst Dashboard features and functionality are the same across all modules where that functionality is in use.

## Navigation in iRIS™

iRIS™ includes two standard navigation tools on all pages that are nested one or more levels beneath the primary module workspace page (e.g., Study Assistant, Conflict of Interest Assistant, Animal Resource Center, etc.): a Path directory tree and a **Back** button.

### Path Directory Tree

The **Path** item at the upper left of the iRIS™ header provides a hyperlinked menu directory tree, allowing the user to quickly navigate back through the path they followed to get to their current location. **Path** appears on all pages nested at least one level beneath the main workspace

In the example shown below, the user is viewing the **Broadcast Notice**  **Add a new notice** page. This page is nested three levels beneath the main workspace page, as indicated by the three links available in the **Path** directory tree: **Home**, **board admin** and **broadcast notice**.



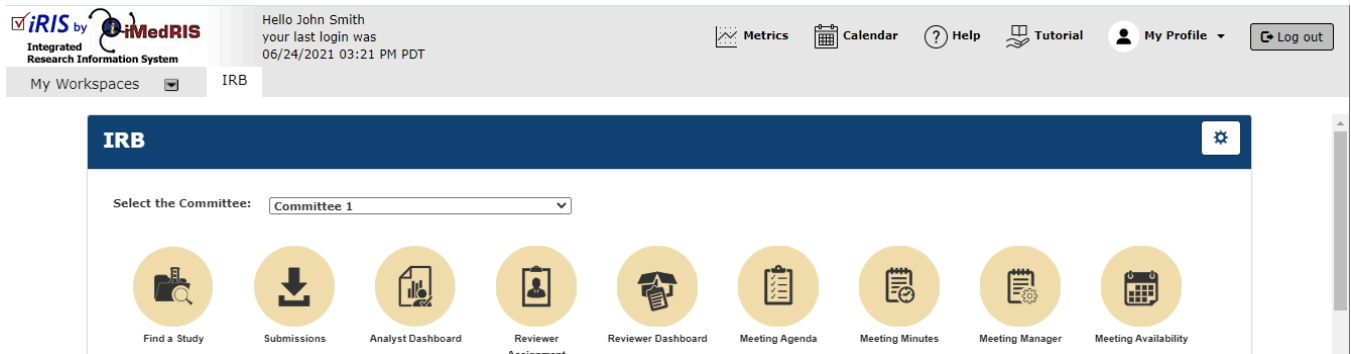
Click on **broadcast notice** in the **Path** to navigate up one level in the directory tree, to the main **Broadcast Notice** page. There are now two levels in the **Path** directory tree: **board admin** and **Home**.



Click on **board admin** in the **Path** to navigate up one level in the directory tree, to the **Board Administration** page. There is now one level in the **Path**: **Home**.



Click on **Home** in the **Path** to navigate up one level in the directory tree to the main workspace page. No Path item is displayed here because the user is now at the top-most level of the directory tree.



## Back Button

The second navigation tool is the **Back** button, which appears on all pages nested at least one level beneath the main workspace. The **Back** button takes the user to the same location as the last link shown in the **Path**.



In the example shown above, both the **Back** button and the **broadcast notice** link in the **Path** return the user to the **Broadcast Notice** page.

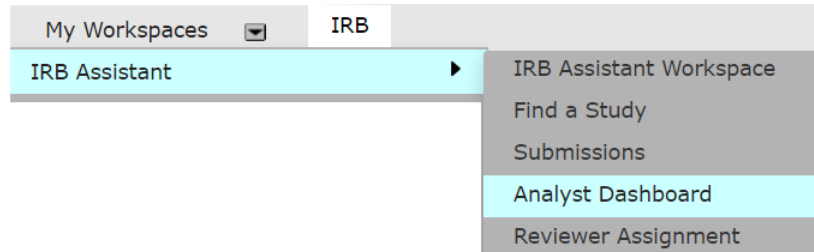


Clicking the **Back** button on the **Broadcast Notice** page returns the user to the **Board Administration** page, as indicated by the last link in the **Path** directory tree shown in the screenshot above.

*Note that where the **Back** button appears on a page with editable fields or document upload controls, clicking the button before saving changes returns the user to the same location as the last link shown in the **Path** without saving changes.*

## Analyst Dashboard Queues

Navigate to [Review Board Module] > **Analyst Dashboard**.



The **Analyst Dashboard** is a tool that enables Review Board Coordinators to access Analyst assignments and review submissions related to a specific meeting date.

Click the **Analyst Dashboard** link. The dashboard opens to the **Submission Workspace** view by default.

The **Analyst Dashboard** is organized into different queues based on the Submission Process Type selected by the board:

- **Submissions Assigned to you (No Review Process/Process Administratively)**
- **Submissions Assigned to you**
- **Awaiting Response from Study Team**
- **Submissions awaiting Pre-Review Screening**
- **Submissions awaiting Expedited Review**
- **Submissions awaiting Full Committee Scheduling Review**
- **Submissions Assigned to Full Board**
- **Submissions awaiting Administrative Review**
- **Submissions awaiting Exempt Review**
- **Submissions awaiting Emergency Use Review**
- **Submissions awaiting Designated Reviewer**
- **Submissions awaiting Facilitated Review**

Each queue is pictured and described below.

Submissions Assigned to you (No Review Process/Process Administratively) [ Open Search ] ⚙️

0 result(s) found... 0 - 0

Open	Study Status	Ref Number	IRB Number IRB Expiration Date	Codes	Review Process Form Type	Board Received Date Agenda Date	Assigned Analyst Assigned Analyst Date	Principal Investigator Reviewers Complete
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**Submissions Assigned to you (No Review Process/Process Administratively):** This queue includes all submissions assigned to the logged-in user as an Analyst that have either not been assigned a review process or are assigned a *Process Administratively* review process.

Submissions Assigned to you [ Open Search ]									
0 result(s) found... 0 - 0									
Open	Study Status	Ref Number	IRB Number	Codes	Review Process	Board Received Date	Assigned Analyst	Principal Investigator	
			IRB Expiration Date		Form Type	Agenda Date	Assigned Analyst Date	Reviewers Complete	

**Submissions Assigned to you:** This queue includes all submissions assigned to the logged-in user as an Analyst that have been assigned a review process (other than *Process Administratively*).

Awaiting Response from Study Team [ Open Search ]									
0 result(s) found... 0 - 0									
Open	Study Status	Ref Number	IRB Number	Codes	Review Process	Board Received Date	Assigned Analyst	Principal Investigator	
			IRB Expiration Date		Form Type	Agenda Date	Assigned Analyst Date	Reviewers Complete	

**Awaiting Response from Study Team:** This queue includes all submissions assigned to the logged-in user as an Analyst that are pending responses from the study team and do not currently require Analyst review.

Submissions awaiting Pre-Review Screening [ Open Search ]									
0 result(s) found... 0 - 0									
Open	Study Status	Ref Number	IRB Number	Codes	Review Process	Board Received Date	Assigned Analyst	Principal Investigator	
			IRB Expiration Date		Form Type	Agenda Date	Assigned Analyst Date	Reviewers Complete	

**Submissions awaiting Pre-Review Screening:** This queue includes all submissions awaiting Pre-Review Screening (i.e., all submissions that have not been assigned a review process), regardless of the Analyst on the submission.

Submissions awaiting Expedited Review [ Open Search ]									
4 result(s) found... 1 - 4									
Open	Study Status	Ref Number	IRB Number	Codes	Review Process	Board Received Date	Assigned Analyst	Principal Investigator	
			IRB Expiration Date		Form Type	Agenda Date	Assigned Analyst Date	Reviewers Complete	

**Submissions awaiting Expedited Review:** This queue includes all submissions that have been assigned an *Expedited* review process, regardless of the Analyst on the submission.

Submissions awaiting Full Committee Scheduling Review [ Open Search ]														
4 result(s) found... 1 - 4														
Open	Study Status	Ref Number	IRB Number		Classification	Codes	Review Process		Board Received Date		Assigned Analyst	Principal Investigator		Department
			IRB Expiration Date				Form Type		Agenda Date	Assigned Analyst Date		Reviewers Complete		

**Submissions awaiting Full Committee Scheduling Review:** This queue includes all submissions that have been assigned a *Full Committee Review* review process but have not been assigned a meeting date, regardless of the Analyst on the submission.

Submissions Assigned to Full Board [ Open Search ]														
333 result(s) found... 1 - 10														
Open	Study Status	Ref Number	IRB Number		Classification	Codes	Review Process		Board Received Date		Assigned Analyst	Principal Investigator		Department
			IRB Expiration Date				Form Type		Agenda Date	Assigned Analyst Date		Reviewers Complete		

**Submissions Assigned to Full Board:** This queue includes all submissions that have been assigned a *Full Committee Review* review process and have been assigned a meeting date, regardless of the Analyst on the submission.

Submissions awaiting Administrative Review [ Open Search ]													
2 result(s) found... 1 - 2													
Open	Study Status	Ref Number	IRB Number		Codes	Review Process		Board Received Date	Assigned Analyst		Principal Investigator		Department
			IRB Expiration Date			Form Type			Assigned Analyst Date	Reviewers Complete			

**Submissions awaiting Administrative Review:** This queue includes all submissions that have been assigned a *Process Administratively* review process, regardless of the Analyst on the submission.

Submissions awaiting Exempt Review [ Open Search ]													
88 result(s) found... 1 - 10													
Open	Study Status	Ref Number	IRB Number		Classification	Codes	Review Process		Board Received Date	Assigned Analyst		Principal Investigator	Department
			IRB Expiration Date	Form Type			Assigned Analyst Date	Reviewers Complete					

**Submissions awaiting Exempt Review:** This queue includes all submissions that have been assigned an *Exempt* review process, regardless of the Analyst on the submission.

Submissions awaiting Emergency Use Review [ Open Search ]													
19 result(s) found... 1 - 10													
Open	Study Status	Ref Number	IRB Number		Classification	Codes	Review Process		Board Received Date	Assigned Analyst		Principal Investigator	Department
			IRB Expiration Date	Form Type			Assigned Analyst Date	Reviewers Complete					

**Submissions awaiting Emergency Use Review:** This queue includes all submissions that have been assigned an *Emergency Use* review process, regardless of the Analyst on the submission.

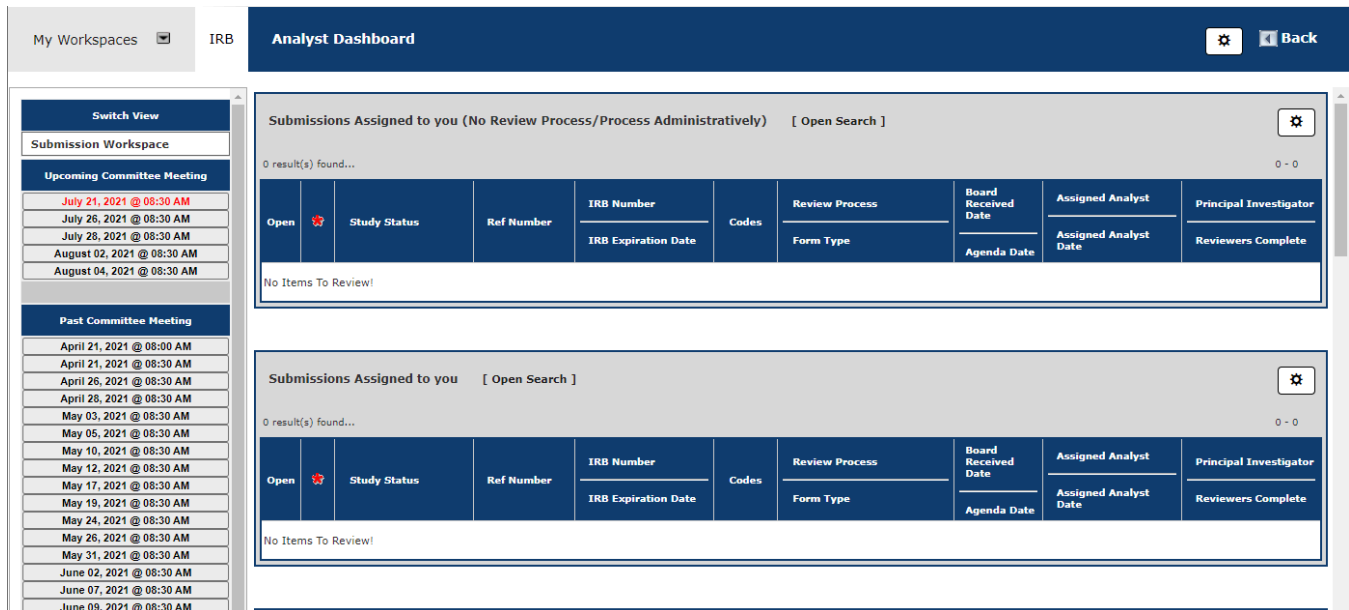
Submissions awaiting Designated Reviewer [ Open Search ]												
4 result(s) found... 1 - 4												
Open	Study Status	Ref Number	IRB Number		Codes	Review Process		Board Received Date	Assigned Analyst		Principal Investigator	Department
			IRB Expiration Date	Form Type		Agenda Date	Assigned Analyst Date		Reviewers Complete			

**Submissions awaiting Designated Reviewer:** This queue includes all submissions that have been assigned a *Designated Reviewer* review process, regardless of the Analyst on the submission.

Submissions awaiting Facilitated Review [ Open Search ]													
11 result(s) found... 1 - 10													
Open	Study Status	Ref Number	IRB Number		Classification	Codes	Review Process		Board Received Date	Assigned Analyst		Principal Investigator	Department
			IRB Expiration Date	Form Type			Agenda Date	Assigned Analyst Date		Reviewers Complete			

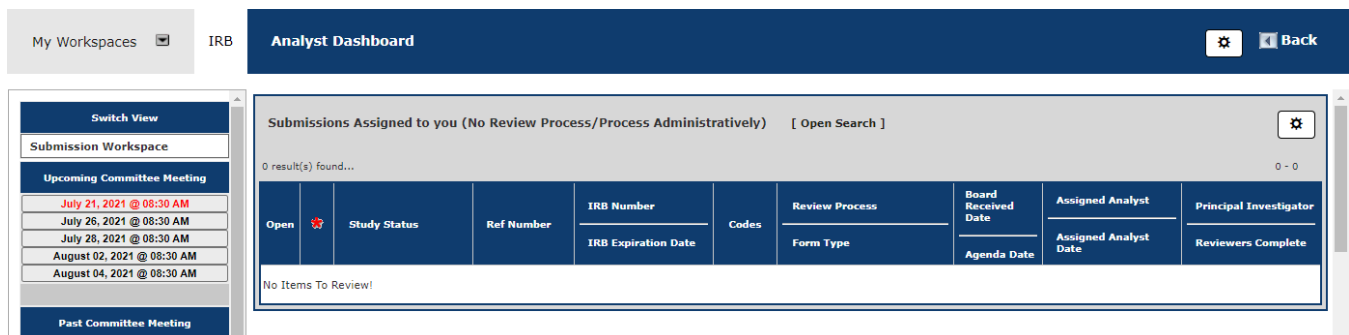
**Submissions awaiting Facilitated Review:** This queue includes all submissions that have been assigned a *Facilitated* review process, regardless of the Analyst on the submission.

In addition to the panels listed above, the **Analyst Dashboard** contains links listed in a left-hand sidebar menu. These links enable users to change screen views, view the agenda for different meeting dates, and view a 30-day calendar. The **Switch View** area contains a link to the **Submission Workspace** view, which is opened by default.

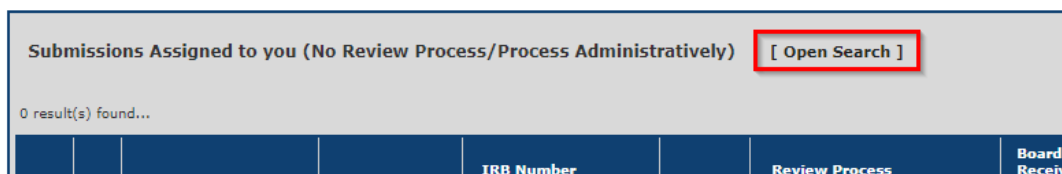


## Submission Workspace

The **Submission Workspace** displays all Analyst assignments for the review board, for both the logged-in user and any other Analysts.



To filter assignment records in a specific panel, click the **Open Search** link in that panel.




This opens a set of filters that can be used to search for specific analyst assignments.


Submissions Assigned to you (No Review Process/Process Administratively) [ Close Search ]

0 result(s) found... 0 - 0

Open	Study Status	Ref Number	IRB Number	IRB Expiration Date	Codes	Review Process	Form Type	Board Received Date	Agenda Date	Assigned Analyst	Assigned Analyst Date	Principal Investigator	Reviewers Complete
No Items To Review!													

Click the **Close Search** button to hide the search form.

Click the  icon in the upper right corner of a panel and select **Close Panel** to hide that panel from view.

Click the  icon in the **Open** column to view the details of a submission.

Submissions awaiting Full Committee Scheduling Review [ Open Search ]

1 result(s) found... 1 - 1

Open	Study Status	Ref Number	IRB Number	IRB Expiration Date	Codes	Review Process	Form Type	Board Received Date	Agenda Date	Committee	Assigned Analyst	Assigned Analyst Date	Principal Investigator	Reviewers Complete
	Active	001268	IRB-21-453	06/17/2022	BIO DRG Cov19	Full Committee Review	Initial Review Submission Form	06/18/2021 9:12:14 AM PDT		NIH - FD - 12345 - Serum biomarkers for prediction of mortality in patients with COVID-19	Coordinator, Jane	06/18/2021 9:12:14 AM PDT	Investigator, John	

Please see the IRB Assistant - Submission Processing manual for additional information about submission processing.

## Committee Meetings

The **Upcoming Committee Meeting** area displays upcoming meetings, with the closest meeting date highlighted in red. From here, the Analyst can access a list of submissions scheduled for review on a particular meeting date, as well as view/edit the meeting setup.

Please see the IRB Assistant - Meetings manual for additional information about meeting management.

Click any meeting date under **Upcoming Committee Meetings** or **Past Committee Meetings** section to view meeting details.

My Workspaces ▾ IRB Board Meeting Agenda Back

Items to be Reviewed at Committee 1 Meeting : ◀ 07/21/2021 @ 08:30 AM ▶ Submission Review validation Save Changes

- Meeting Attendance
- Call to Order
- Old Business
- New Business
- Miscellaneous
- Closing Comments
- Meeting Motions
- Review Documents

View File	Title
No documents have been associated with this agenda	

Meeting Start Time:  :  AM Meeting End Time:  :  AM Meeting Chair: --none--

**Initial Reviews** - 1 Submissions

Order	Click to open	IRB Number	Ref Num	COI	2019 Common Rule?	Letters	Outcome	Type	Principal Investigator	Reviewer(s)	Date Board Received
1		IRB-21-483	001320		Yes		Approved	Initial Review Submission Form	Investigator, John	Primary John Smith	07/19/2021 9:39:26 AM PDT

## Analyst Specific Tasks

The **Analyst Assignment** home screen task populates when the logged in user is assigned Analyst tasks. These tasks remain on the home screen until the task has been completed. Click the icon in the **Open** column to access the **Submission Details** tab within submission processing for the task.

**All Tasks** Outstanding Completed Settings

All Tasks Study Tasks Project Tasks

Task List : All Filter By : --none--

22 result(s) found... 1 - 5 ▶

Click to open	Task Type	Date Received	Description	Priority	Complete By
<input type="checkbox"/>	Analyst Assignment	07/20/2021 10:05 AM PDT	John Smith has been assigned as the analyst, assigned by John Smith	No Priority	<input type="text"/>

The user may receive an email notification indicating the Analyst assignment.

The **Submission Reviewers Complete** notification populates under the **All Tasks- Outstanding** home screen when an assigned reviewer has completed their reviewer checklist. Additionally, the user may receive an email notification indicating that the reviewer has completed their checklist. Opening this task opens the **Pre-review Screening** tab within submission processing.

The screenshot shows the 'All Tasks' dashboard with the 'Outstanding' tab selected. The task list shows 23 results. The first task is 'Submission Reviewers Complete', which is a 'No Priority' task due on 07/20/2021 at 10:06 AM PDT. The description states: 'All reviewers completed the review of the submission.'

Click to open	Task Type	Date Received	Description	Priority	Complete By
<input type="checkbox"/>	Submission Reviewers Complete	07/20/2021 10:06 AM PDT	All reviewers completed the review of the submission.	No Priority	<input type="text"/>

The **Internal Submission Routing Complete** notification populates under the **All Tasks - Outstanding** home screen when all internal routing for the submission is complete. Additionally, the user may receive an email notification indicating that all internal routing signoffs have been completed. Opening this task opens the **Submission Review** tab within submission processing.

The screenshot shows the 'All Tasks' dashboard with the 'Outstanding' tab selected. The task list shows 24 results. The first task is 'Internal Submission Routing Complete', which is a 'No Priority' task due on 07/20/2021 at 10:10 AM PDT. The description states: 'Internal submission routing review completed by John Smith.'

Click to open	Task Type	Date Received	Description	Priority	Complete By
<input type="checkbox"/>	Internal Submission Routing Complete	07/20/2021 10:10 AM PDT	Internal submission routing review completed by John Smith	No Priority	<input type="text"/>

The **Outcome Letter Signoff Complete** notification populates under the **All Tasks- Outstanding** when all signatures on an **Outcome Letter** for the submission have been collected. Additionally, the user may receive an email notification indicating that all Outcome Letter signatures have been completed. Opening this task opens the **Submission Outcome** tab within submission processing.

The screenshot shows the 'All Tasks' dashboard with the 'Outstanding' tab selected. The task list shows 25 results. The first task is 'Outcome Letter Signoff Complete', which is a 'No Priority' task due on 07/20/2021 at 10:12 AM PDT. The description states: 'All of the signoffs for the Initial Review Approval outcome letter have been completed.'

Click to open	Task Type	Date Received	Description	Priority	Complete By
<input type="checkbox"/>	Outcome Letter Signoff Complete	07/20/2021 10:12 AM PDT	All of the signoffs for the Initial Review Approval outcome letter have been completed.	No Priority	<input type="text"/>