



## IACUC ASSISTANT

---

*Analyst Dashboard*

Version 11.02

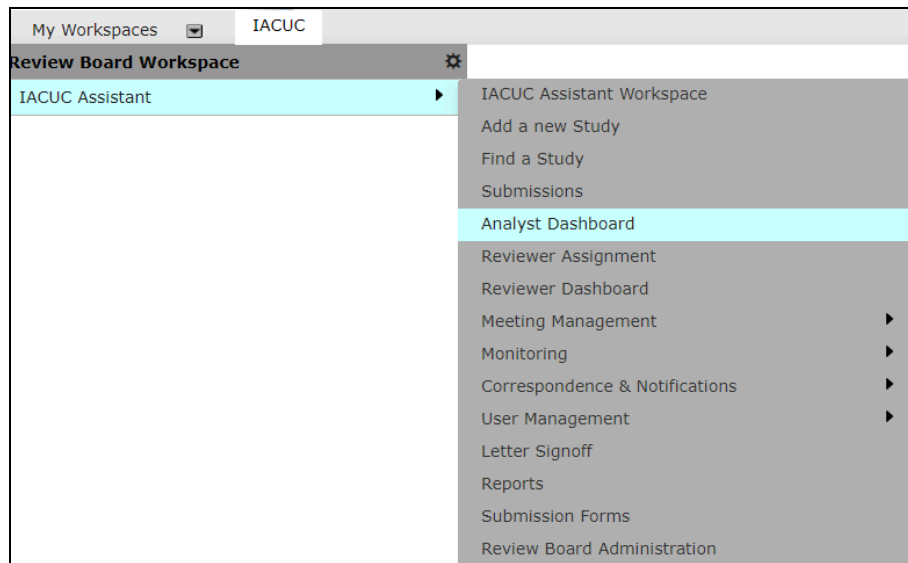
## Contents

|                                |   |
|--------------------------------|---|
| Introduction.....              | 2 |
| Inbox/ Analyst Assignment..... | 3 |
| Committee Meetings.....        | 3 |
| Analyst Specific Tasks.....    | 4 |

# IACUC Assistant – Analyst Dashboard

## Introduction

This manual will guide you through the process of using the **Analyst Dashboard** menu item in the **IACUC Assistant** group on the homepage of your iRIS software. The **Analyst Dashboard** is a tool available for Review Board Coordinators where analyst assignments can be accessed. Assignments to other analysts can also be accessed from here, and submissions related to a specific meeting date can be reviewed.



All your complete and incomplete Analyst Assignments can be viewed within your dashboard. When accessing the **Analyst Dashboard**, you will initially be directed to the Analyst Assignment view. The Analyst Dashboard will be organized into different queues based on the Submission Process Type selected by the board: **Submission Assigned to you (No Review Process/ Process Administratively)** , **Submission Assigned to you**, **Submissions awaiting Study Team**, **Submissions awaiting Exempt or Administrative Review**, **Submissions awaiting Expedited Review**, **Submissions awaiting Designated Reviewer**, and **Submissions awaiting Full Scheduling Review**.

| Submissions Assigned to you (No Review Process/Process Administratively) [ Open Search ] |              |            |                         |                |                |                     |                       |                        |            |  |
|--|--------------|------------|-------------------------|----------------|----------------|---------------------|-----------------------|------------------------|------------|--|
| 1 result(s) found...   |              |            |                         |                |                |                     |                       |                        |            |  |
| Open   | Study Status | Ref Number | IACUC Number            | Classification | Review Process | Board Received Date | Assigned Analyst      | Principal Investigator | Department |  |
|  |              |            | IACUC Expiration Number |                | Form Type      | Agenda Date         | Assigned Analyst Date | Reviewers Complete     |            |  |

| Submissions Assigned to you [ Open Search ] |              |            |                         |                |                |                     |                       |                        |            |  |
|---|--------------|------------|-------------------------|----------------|----------------|---------------------|-----------------------|------------------------|------------|--|
| 12 result(s) found...                       |              |            |                         |                |                |                     |                       |                        |            |  |
| Open  | Study Status | Ref Number | IACUC Number            | Classification | Review Process | Board Received Date | Assigned Analyst      | Principal Investigator | Department |  |
|   |              |            | IACUC Expiration Number |                | Form Type      | Agenda Date         | Assigned Analyst Date | Reviewers Complete     |            |  |

| Awaiting Response from Study Team [ Open Search ] |  |              |            |   |                |                             |                                    |   |  |            |
|---|--|--------------|------------|---|----------------|-----------------------------|------------------------------------|---|--|------------|
| 0 result(s) found...                              |  |              |            |   |                |                             |                                    |   |  |            |
| Open  |  | Study Status | Ref Number | IACUC Number<br>IACUC Expiration Number | Classification | Review Process<br>Form Type | Board Received Date<br>Agenda Date | Assigned Analyst<br>Assigned Analyst Date | Principal Investigator<br>Reviewers Complete | Department |

| Submissions awaiting Prereview Screening [ Open Search ] |  |              |            |   |                |                             |                                    |   |  |            |
|--|--|--------------|------------|---|----------------|-----------------------------|------------------------------------|---|--|------------|
| 0 result(s) found...                                     |  |              |            |   |                |                             |                                    |   |  |            |
| Open   |  | Study Status | Ref Number | IACUC Number<br>IACUC Expiration Number | Classification | Review Process<br>Form Type | Board Received Date<br>Agenda Date | Assigned Analyst<br>Assigned Analyst Date | Principal Investigator<br>Reviewers Complete | Department |

| Submissions awaiting Administrative Review [ Open Search ] |  |              |            |   |                |                             |                                    |   |  |            |
|--|--|--------------|------------|---|----------------|-----------------------------|------------------------------------|---|--|------------|
| 186 result(s) found...                                     |  |              |            |   |                |                             |                                    |   |  |            |
| Open   |  | Study Status | Ref Number | IACUC Number<br>IACUC Expiration Number | Classification | Review Process<br>Form Type | Board Received Date<br>Agenda Date | Assigned Analyst<br>Assigned Analyst Date | Principal Investigator<br>Reviewers Complete | Department |

| Submissions awaiting Expedited Review [ Open Search ] |  |              |            |   |                |                             |                                    |   |  |            |
|---|--|--------------|------------|---|----------------|-----------------------------|------------------------------------|---|--|------------|
| 17 result(s) found...                                 |  |              |            |   |                |                             |                                    |   |  |            |
| Open  |  | Study Status | Ref Number | IACUC Number<br>IACUC Expiration Number | Classification | Review Process<br>Form Type | Board Received Date<br>Agenda Date | Assigned Analyst<br>Assigned Analyst Date | Principal Investigator<br>Reviewers Complete | Department |


| Submissions awaiting Designated Reviewer [ Open Search ] |  |              |            |   |                |                             |                                    |   |  |            |
|--|--|--------------|------------|---|----------------|-----------------------------|------------------------------------|---|--|------------|
| 20 result(s) found...                                    |  |              |            |   |                |                             |                                    |   |  |            |
| Open   |  | Study Status | Ref Number | IACUC Number<br>IACUC Expiration Number | Classification | Review Process<br>Form Type | Board Received Date<br>Agenda Date | Assigned Analyst<br>Assigned Analyst Date | Principal Investigator<br>Reviewers Complete | Department |

| Submissions awaiting Full Committee Scheduling Review [ Open Search ] |  |              |            |   |                |                             |                                    |   |  |            |
|---|--|--------------|------------|---|----------------|-----------------------------|------------------------------------|---|--|------------|
| 11 result(s) found...   |  |              |            |   |                |                             |                                    |   |  |            |
| Open  |  | Study Status | Ref Number | IACUC Number<br>IACUC Expiration Number | Classification | Review Process<br>Form Type | Board Received Date<br>Agenda Date | Assigned Analyst<br>Assigned Analyst Date | Principal Investigator<br>Reviewers Complete | Department |

To the left of the page you can switch screen views, view the agenda for different meeting dates, and view a 30-day calendar. The Switch View area contains links to the **Inbox** and **Analyst Assignment**. This view will allow you to see your current analyst assignments with the ability to filter the results for a specific date.


The screenshot displays the IACUC Analyst Dashboard interface. On the left, there is a sidebar with navigation options: 'Switch View', 'Submission Workspace', 'Upcoming Committee Meeting' (August 05, 2019), and 'Past Committee Meeting' (July 25, 2019 and July 29, 2019). Below this is a calendar for July 2019. The main content area is titled 'Analyst Dashboard' and features a 'Filter by Committees' dropdown set to 'All'. There are two main sections for submission queues. The first section, 'Submissions Assigned to you (No Review Process/Process Administratively)', shows 1 result found and a table with columns: Open, Study Status, Ref Number, IACUC Number, IACUC Expiration Number, Classification, Review Process, Form Type, Board Received Date, Agenda Date, Assigned Analyst, Assigned Analyst Date, Principal Investigator, Reviewers Complete, and Department. The second section, 'Submissions Assigned to you', shows 12 results found and a similar table structure.

## Inbox/ Analyst Assignment

The **Inbox** link displays all analyst assignments for the review board. This includes your own assignments as well as assignments for the other analysts that have been assigned a submission. The search criteria at the top of each of the queues will allow you to search for specific assignments. The **Inbox** page contains the table shown below containing all analyst assignments for the board. The page also contains search and view options that can help you identify current analyst assignments as well as previously completed assignments. You can click the **Close Search** button to hide the search criteria. The  icon will hide the menu on the left, allowing the Task List queue to display on the entire page. You may sort the submissions by any of the columns from **IACUC Number** to **Assigned Analyst** by clicking on the column. You may then indicate the sort order alphabetically from A-Z or Z-A.

The filter options allow you to easily find and access any submission that has been assigned. The Filter the Awaiting Submissions option will allow the user to apply the filter to the awaiting submissions sections: **Submission Type** contains a list of submission form types. The search criteria at the top of each queue will allow you to search for specific submissions. You can select the **Close Search** link to hide the search criteria or select the **Open Search** link to show the search criteria. The filter options allow you to easily find and access any submissions that have been assigned. Once you have applied the filter, the **Find** button must be selected to apply the filter(s) to the queue.

This screenshot shows a detailed search filter interface within the IACUC Analyst Dashboard. The top navigation bar includes 'My Workspaces', 'IACUC', and 'Analyst Dashboard'. Below the navigation, there is a table header with columns: IACUC Expiration Date, Form Type, Agenda Date, Assigned Analyst Date, and Reviewers Complete. The main content area is titled 'Submissions Assigned to Full Board' and shows 'No Items To Review'. Below this, there is a search filter section with the following fields: Committees (dropdown), Submission Type (dropdown), Principal Investigator (text input), Date Task Received (date range), IACUC Number (text input, value: IACUC-2019-2312), IACUC Expiration Date (date range), Ref Number (text input), Study Status (dropdown), Assigned Analyst (text input), Assigned Reviewers (text input), Department (dropdown), Study Classification (dropdown), Include Assigned Analyst (radio buttons: Yes, No, All), and Include Submission Assigned to a Reviewer (radio buttons: Yes, No, All). There are 'Reset Find Options' and 'Find ...' buttons on the right. The bottom of the filter section shows '1 result(s) found...'.

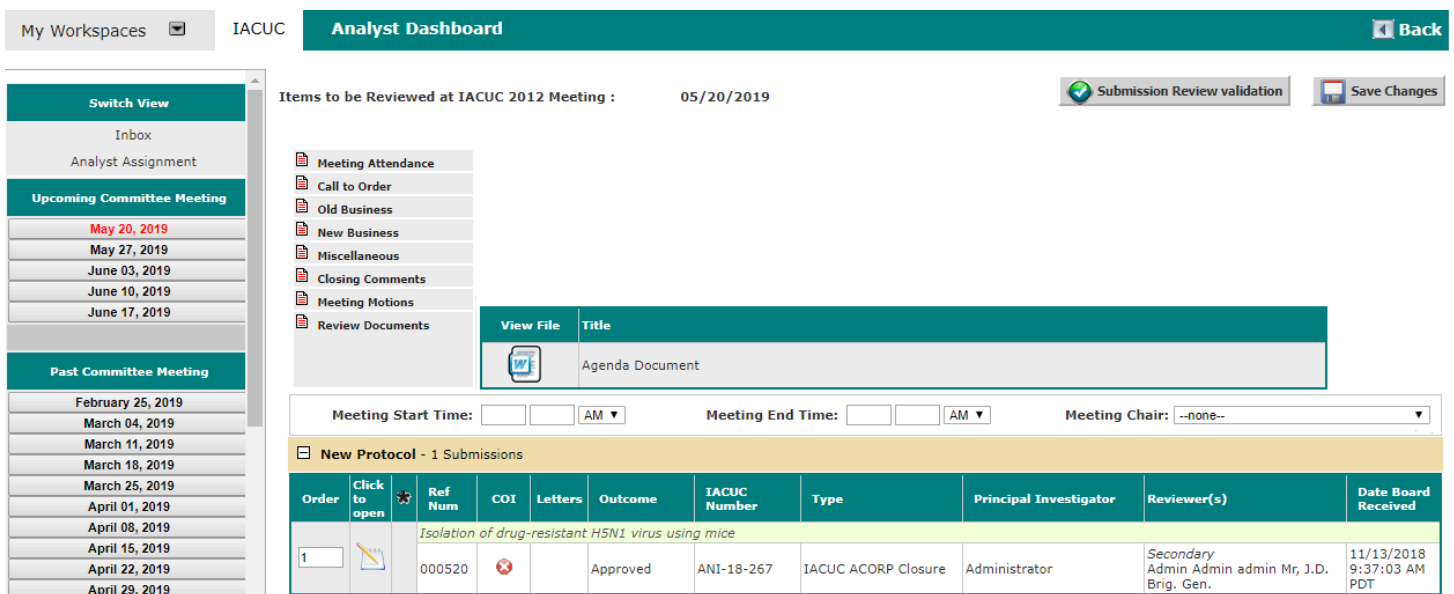
**Click to open** – Access the submission and all the components by clicking the  icon in the open column. Please see the **IACUC Assistant - Submission Processing** manual for additional information.

The **Analyst Assignment** and **Inbox** links share the same function except the Analyst Assignment link will only display your specific assignments.



## Committee Meetings

The **Upcoming Committee Meeting** area displays the next upcoming meetings, with the closest meeting in red. From this view, you can access submissions placed on a particular meeting date, and view/edit the setup for the meeting. (Please see the IACUC - Meetings manual for additional information.)

You will be able to view different meetings by clicking on any meeting date underneath the **Upcoming Committee Meetings** or **Past Committee Meetings** section.



The screenshot shows the 'Analyst Dashboard' for the IACUC. It features a sidebar with navigation options like 'Switch View', 'Inbox', and 'Upcoming Committee Meeting'. The main area displays 'Items to be Reviewed at IACUC 2012 Meeting : 05/20/2019'. Below this, there are sections for 'Meeting Attendance', 'Call to Order', 'Old Business', 'New Business', 'Miscellaneous', 'Closing Comments', 'Meeting Motions', and 'Review Documents'. A 'View File' section shows an 'Agenda Document'. Meeting details include 'Meeting Start Time', 'Meeting End Time', and 'Meeting Chair'. A table titled 'New Protocol - 1 Submissions' contains the following data:

| Order | Click to open   | Ref Num | COI   | Letters | Outcome  | IACUC Number | Type                | Principal Investigator | Reviewer(s)                                     | Date Board Received       |
|-------|---|---------|---|---------|----------|--------------|---------------------|------------------------|---|---------------------------|
| 1     |  | 000520  |  |         | Approved | ANI-18-267   | IACUC ACORP Closure | Administrator          | Secondary Admin Admin admin Mr, J.D. Brig. Gen. | 11/13/2018 9:37:03 AM PDT |

## Analyst Specific Tasks

The **Analyst Assignment** home screen task populates when you have been assigned as an analyst. The task will stay on your home screen until the task has been completed. Additionally, you may receive an email notification indicating that you have an analyst assignment. Opening this task navigates you to the General Information tab within submission processing.

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

The screenshot shows the 'All Tasks' section with the 'Outstanding' tab selected. The 'Task List' dropdown is set to 'Submission Reviewers Complete'. Below the navigation tabs, there is a table with one row of task data.

| Click to open | Task Type                     | Received                   | Description   |
|---------------|-------------------------------|----------------------------|---|
|               | Submission Reviewers Complete | 02/04/2019<br>01:58 PM PST | All reviewers completed the review of the submission. |

The **Internal Submission Routing Signoff** notification will populate under the **All Tasks- Outstanding** home screen when all internal routing for this submission is complete. Additionally, you may receive an email notification indicating that all internal routing signoffs have been completed. Opening this task navigates you to the Internal Submission Routing tab within submission processing.

The screenshot shows the 'All Tasks' section with the 'Outstanding' tab selected. The 'Task List' dropdown is set to 'Internal Submission Routing Signoff'. Below the navigation tabs, there is a table with one row of task data.

| Click to open | Task Type                           | Received                   | Description  |
|---------------|-------------------------------------|----------------------------|--|
|               | Internal Submission Routing Signoff | 03/05/2019<br>04:06 PM PST | Admin Admin admin Mr, B.S. Brig. Gen. has been assigned to Administratively review the submission. |

The **Outcome Letter Signoff** notification will populate under the **All Tasks- Outstanding** when all signatures on an **Outcome Letter** for this submission have been collected. Additionally, you may receive an email notification indicating that all Outcome Letter signatures have been completed. Opening this task navigates you to the Outcome Letter tab within submission processing.

The screenshot shows the 'All Tasks' section with the 'Outstanding' tab selected. The 'Task List' dropdown is set to 'Internal Submission Routing Signoff'. Below the navigation tabs, there is a table with one row of task data.

| Click to open | Task Type                           | Received                   | Description  |
|---------------|-------------------------------------|----------------------------|--|
|               | Internal Submission Routing Signoff | 04/12/2019<br>01:56 PM PDT | Admin Admin admin Mr, J.D. Brig. Gen. has been assigned to Administratively review the submission. |