**Navigation Tasks**



**My Inbox:**

**My Inbox** is a personal page that lists projects that require action to move forward. Think of **My Inbox** as your “to-do list”.

1. This section lists any items that require action to move forward. The **Inbox** will contain items from all of the modules in the Click Portal. The **Compliance Tasks** tab will show protocols from the IACUC, IRB, and Safety modules.
2. This is the **header**. The header contains a link to the **My Inbox** page, as well as a link to log out of the system.
3. This is the **top navigation menu**. Click the name of the appropriate module to navigate to that solution.
4. This shows the **Links by Solution**. Click on a link to show the actions available to you for that solution.

 **Basic Tasks from My Inbox:**

* **How do I open a submission?**Locate the **Name** column. Click on the submission’s **Name** and the submission opens to the workspace.
* **How do I determine the state of a submission?**
Locate the **State** column. The **State** column tells you the **State**, or stage, the submission is currently in. The state suggests what action you will take. For example, ***Pre-Submission*** means that you haven’t submitted the protocol. You can finish and submit it for review.
* **How do I determine the actions that I can perform**?
Click on the **Links by Solution** buttons to see the actions you can perform for the selected module.
* **How do I return to the My Inbox page**?
 Click the **My Inbox link** in the header in the upper right hand corner.

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**IACUC Submissions**

The **IACUC Submissions** page collects all the IACUC studies that you have permission to see.

**Note:** Studies that require action to move forward are found on the **My Inbox** page or on your research team’s workspace.

1. The **resource tabs** collect information.
	* **Research Teams** – This tab shows the research teams that you are a member of.
	* **In-Review** – This tab shows submissions undergoing IACUC review.
	* **Active** – This tab shows approved submissions.
	* **Archived** – This tab shows discarded and closed submissions.
	* **All Submissions** – This tab shows all submissions, in any state.
2. The **breadcrumb trail** shows where you are in the system and can be used to find your way back to your starting point.
3. You will use the **project creator buttons** to create a concern, a research team, or a protocol.
4. A **shortcut** takes you to a specific page.
	* **My Inbox** – This shortcut takes you to your My Inbox page.
	* **Help Center** – The Help Center provides program documentation and videos.
	* **Submissions** –The submissions page collects all the IACUC studies that you have permission to see.
	* **Concerns** – This shortcut takes you to concerns and deficiencies.
	* **Reports** – This shortcut takes you to reports. Reports only include studies that you have permission to see.
	* **Library** – This tab is primarily used by other solutions, but it may contain documents used by your IACUC.

**Basic Tasks from the IACUC Submissions Page**

* **How do I start a protocol**?
Open your research team’s study workspace, then start the protocol.
* **How do I see the status of a protocol that is in the hands of the IACUC?**Click the **In-Review** tab.
* **How do I get help?**Click the **Help Center** shortcut.



**Research Team Workspace**

Protocols are created from the **research team workspace**.

1. The **resource tabs** collect information.
	* **Submissions** – This tab shows all the submissions for this research team, from pre-submission to closed.
	* **Procedures** – The tab shows procedures from the standard library and team procedures.
	* **Substances** – This tab shows substances from the standard library and team substances.
	* **History** – This tab shows all of activity for this research team.
	* **Archived Procedures and Archived Substances** – This tab shows procedures and substances that are no longer being used.
	* **Training** – This tab shows training for each research team member.
2. This is the **Edit Research Team** button. **Use Edit Research** Team to make changes to the research team.

**Basic Tasks from the Research Team Workspace**

* **How do I find a study submitted by my research team?**Click the **Submissions** tab.
* **How do I determine the procedures and substances that are available for my research team?**Click on **Procedures** or the **Substances** tab.



**Study Workspace**

All the information regarding a protocol is collected in the **study workspace**.

1. **Summary View** – The summary view summarizes critical information about the protocol.
2. **Workflow Map** – The workflow map shows the current state of the protocol.
3. **Resource Tabs** – The resource tabs collect information about the protocol.
	* **History** – This tab shows the history of the protocol.
	* **Experiments** – This tab shows the experiments
	* **Documents** – This tab provides links to the documents associated with this protocol
	* **Reviews** – This tab displays reviews that you have permission to see based on your role.
	* **Contacts** – This tab lists the contacts for the study.
	* **Snapshots** – Snapshots are moments in the workflow captured by the system.
	* **Training** – This tab lists training of the research team members.
	* **Related Concerns** – This tab lists concerns that were submitted that are associated with this protocol.
	* **Change Log** – The change log shows any changes made after the initial submission.
4. **Activities** – These are the activities that are available to you on this submission while the submission is in this state.

**Basic Tasks from the Study Workspace**

* **How do I learn what has happened since a protocol was submitted?**Click the **History** tab.
* **How do I access protocol documents?**Click the **Documents** tab.
* **How do I learn the name of the IACUC Coordinator assigned to my protocol**?
Look in the **Summary View**.



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**How to Filter Data**

Any time you see a **filter**, you can use it to filter data.

1. Select the column to **Filter by**.
2. Use the **(?) Help Icon** to learn about the different operators you can type in (C).
3. Type the beginning characters for the items you want to find. You can type a % symbol as a wildcard before the characters. For example, 71 shows all the items beginning with 71, whereas %71 shows all the items that contain 71.
4. Click **Go** to apply the filter.
5. To combine multiple criteria at the same time, click **Advanced**.