



eProtocol



General Functionality & Dashboard Manual

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1 OVERVIEW

The eProtocol software is a web-based platform for creating, managing, and reviewing protocols in an efficient and timely manner.

This General Functionality and Dashboard manual outlines the overall functionality of the software and dashboards within eProtocol. It is intended to explain the functions of the software and to provide guidance as you explore this easy-to-use application.



2 LOGIN & WINDOW MANAGEMENT

2.1 Supported browsers & turning off Pop-up blocker

Supported Browsers

In order to use eProtocol to its full capabilities, a supported web browser is mandatory. The browsers compatible with eProtocol are: Internet Explorer 10 and above, Firefox 12 and above, and Safari 7. To begin working with the system, launch the eProtocol link in a supported web browser.

NOTE: Using an unsupported browser will limit the functionality of the application.



Turning off pop-up blockers

Before using eProtocol, it is critical to turn off the pop-up blocker on your browser. Pop-up window navigation is essential and therefore pop-up blockers on this site must be disabled.

Your browser should alert you of a working pop-up blocker upon your entry into the application. Figure 2.1 shows an example of the Internet Explorer browser alerting the user that content is currently being blocked.

In order to allow pop-up access, click the “Options for this site” drop-down button and select “always allow from this site”. This way, the next time you login to eProtocol, the computer will allow all pop-up content specifically from the site.

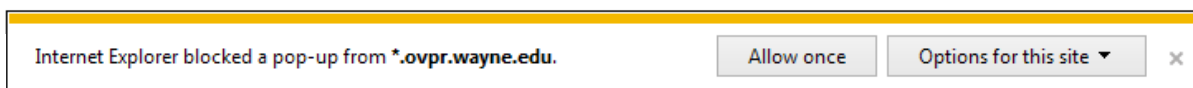


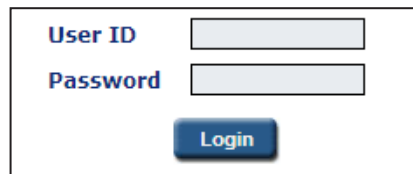
Figure 2.1

2.2 WSU Access ID

In order to login to eProtocol, you must have a Wayne State University Access ID. If you have forgotten your Access ID and password, please contact C&IT help desk for further assistance at (313)-577-4778. If you do not have an Access ID, go to the eProtocol home page for further instructions.

2.3 How to login to eProtocol

On the right side of the screen is the login box. Enter your Access ID followed by your password and click the **Login** button. You will be directed to the eProtocol homepage.



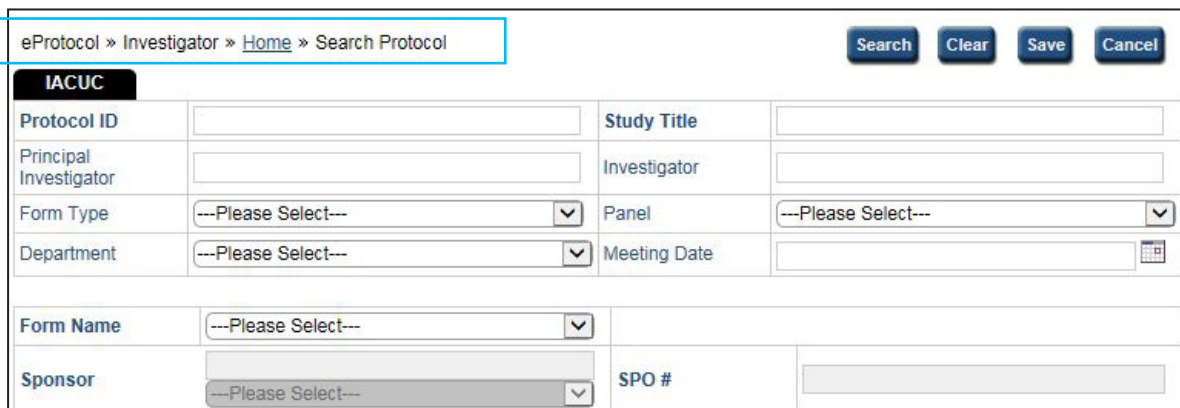
A login form with two input fields: 'User ID' and 'Password'. Below the fields is a blue 'Login' button.

Figure 2.2

2.4 Navigation Aid

The **Navigation Aid** allows users to keep track of their current location within pages or documents. Any navigation aid in eProtocol that is the color blue signifies it is an active link. Clicking the active link will direct the user back to the home dashboard.

NOTE: Do NOT use your browsers back button as it causes serious errors. In all cases, you will be logged out, losing any recently added content.



The navigation aid shows a breadcrumb trail: eProtocol » Investigator » [Home](#) » Search Protocol. The 'Home' link is highlighted in blue. To the right are buttons for Search, Clear, Save, and Cancel. Below is a form with various filters:

IACUC			
Protocol ID	<input type="text"/>	Study Title	<input type="text"/>
Principal Investigator	<input type="text"/>	Investigator	<input type="text"/>
Form Type	---Please Select---	Panel	---Please Select---
Department	---Please Select---	Meeting Date	<input type="text"/>
Form Name	---Please Select---		
Sponsor	---Please Select---	SPO #	<input type="text"/>

Figure 2.3



2.5 User Interface & Functionality

After successfully signing in with your Access ID and password, you will be directed to the eProtocol home dashboard. The home dashboard is separated into two primary areas: the menu bar (top) and the content area. This easy-to-use navigation allows for intuitive and quick operation and is further examined in the pages to follow.

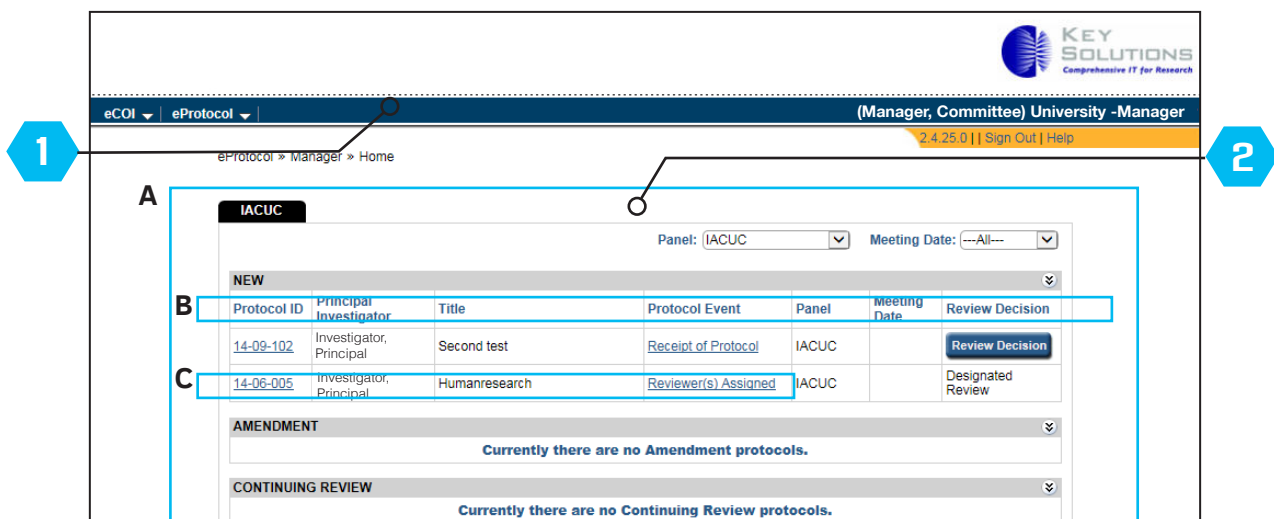


Figure 2.4

- 1 The **top menu** bar is a stationary element in eProtocol and, as such, is always visible from any screen within the eProtocol software. The menu bar holds the primary navigation for the software with its drop-down button features. See pages 10 -13 for a more detailed description on the functionality and use of the top menu bar.
- 2 The **content area** contains important features such as the navigation aid along with a grid. The majority of user interaction will be within the content area of the application.



A - The grid, highlighted in Figure 2.4, is an imperative feature of eProtocol as it organizes and displays content matter necessary for creating, viewing and managing protocols.

B - All dashboards are organized by grids with blue column headers [Figure 2.4, page 7]. The columns have minimal functionality and sort the content. Clicking on the column header will change the listed orientation numerically or alphabetically. See page 17 for more details.

C - Any words with a blue underline in the content represents an active link, meaning, if the user clicks on the link, a pop-up window will appear. See page 17 for more details.

2.6 Sizing of grids, windows, & layouts

This portion of the manual will discuss the sizing of panels and pop-up windows to better support your needs of the eProtocol application as well as the user.

The arrow icons in Figure 2.5a control the amount of information displayed in the content area by opening or collapsing the content. Limiting the amount of content displayed can make for a less overwhelming experience and a cleaner dashboard.

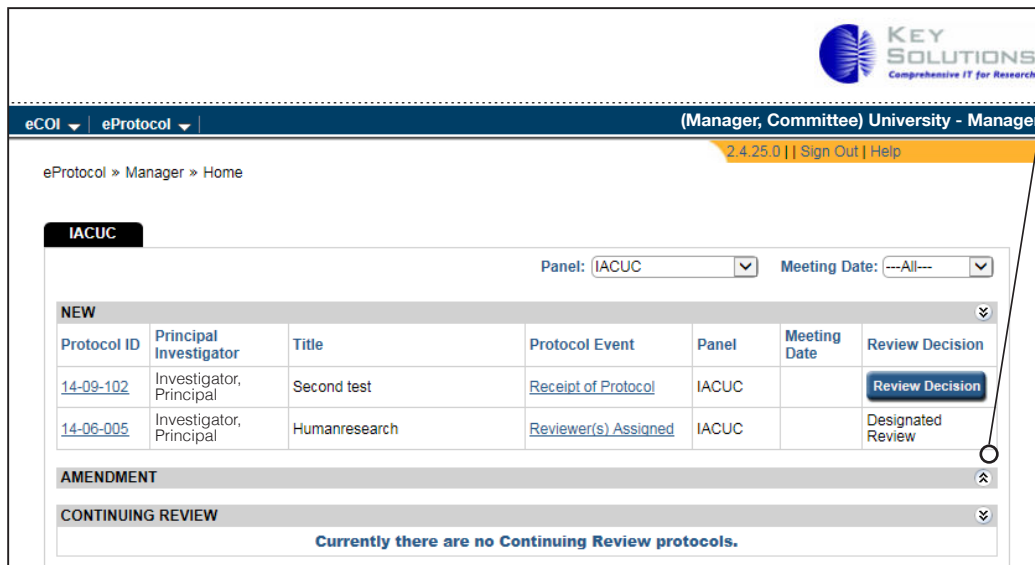


Figure 2.5

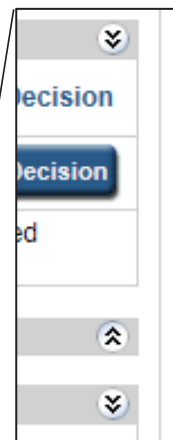


Figure 2.5a



Many of the links in eProtocol generate pop-up windows. The windows appear in the middle of the screen and are all relatively the same size. If a window initially pops up but then goes away, it most likely is hidden behind other tabs in your browser. In most cases, your browser will alert you when a new window has opened by flashing the window or browser icon.

In order to change the size of the windows you can either click the maximize button on the upper right of the pop-up window [Figure 2.6a] or drag and pull the window to your desired size [Figure 2.6b].

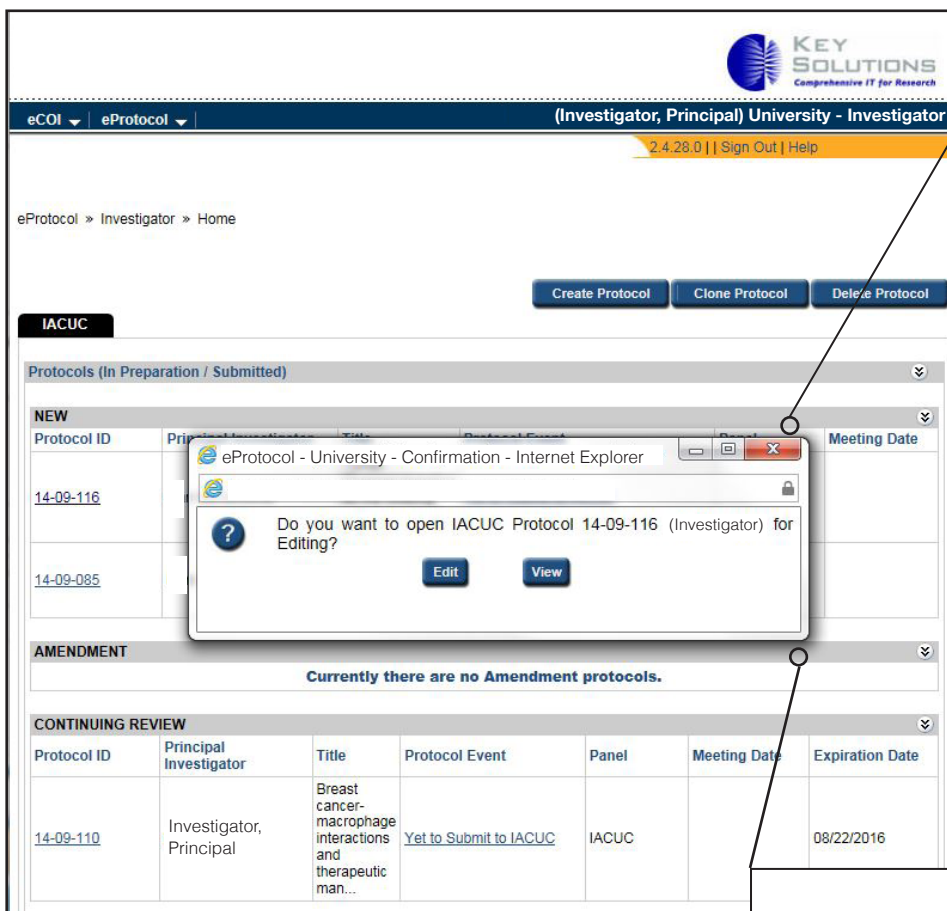


Figure 2.6

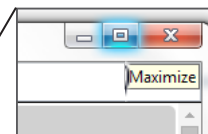


Figure 2.6a

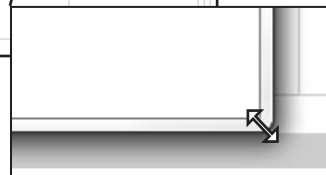


Figure 2.6b

3 TOP NAVIGATION BAR

3.1 Sign Out / Help / User name

When you have saved your work and are ready to sign out of eProtocol, click on the **Sign Out** button found in the upper right hand corner of the browser as seen in Figure 3.1a. It is important to sign out to protect your work and personal information.

When in need of assistance, click the **Help** button located to the right of the sign out button. A pop-up window will appear in the middle of the screen to assist the user. Follow the instructions in the pop-up window.

NOTE: Not signing out could cause a protocol to be “locked for editing” when accessed by another user.

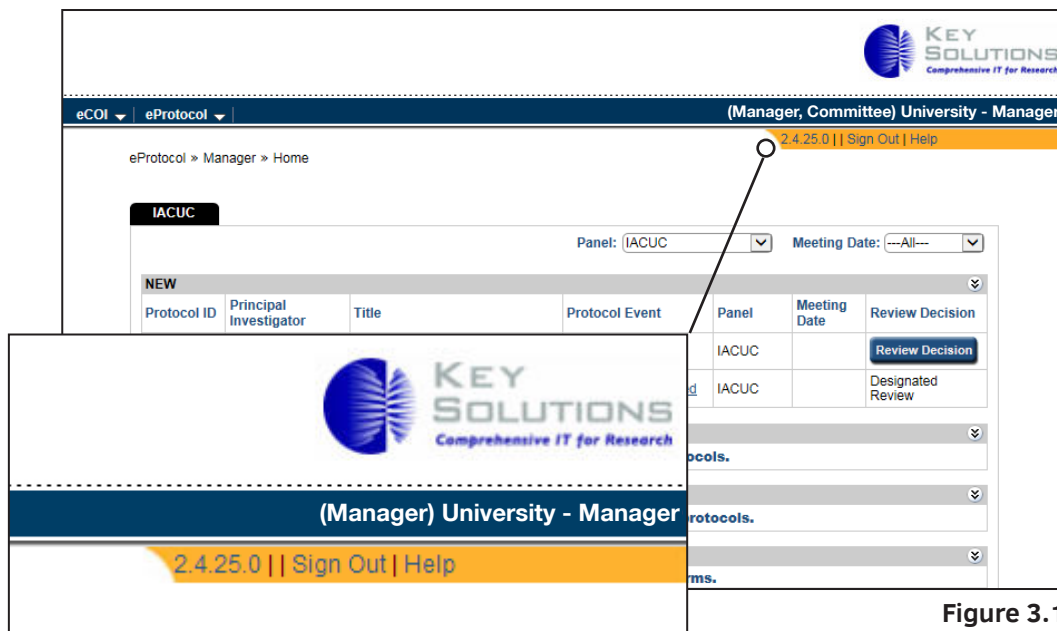


Figure 3.1a

Figure 3.1



The dashboard will display the logged-in user's last name and their current role [Figure 3.1b]. Some users (such as committee members) will have more than one role and each role has a separate dashboard homepage.



Figure 3.1b

3.2 Module Options Drop-down

Primary navigation for all eProtocol users will be at the upper left-hand corner of the browser under the tab 'eProtocol'. The following pages demonstrate what each drop-down menu will look like depending on your role. Further explanation into the drop-down menus and their tabs can be found in other manuals.

NOTE: All dashboards will remain the same but will display different content depending on the users role.

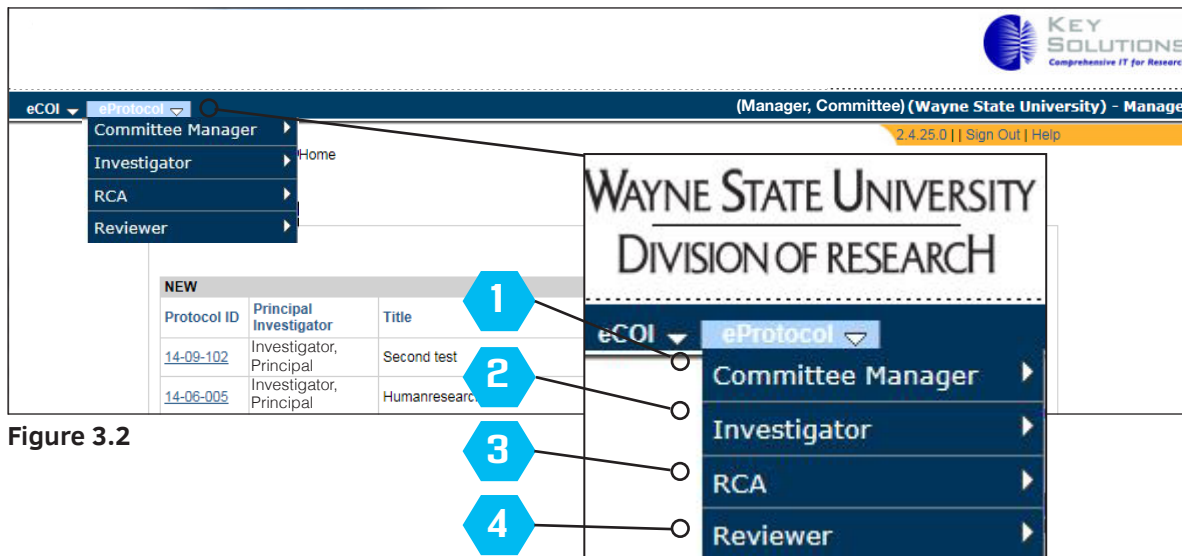


Figure 3.2

Figure 3.2a



1 Committee Manager

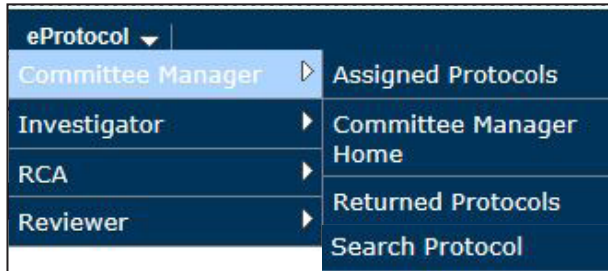


Figure 3.3

Assigned Protocols - a list of protocols that have been assigned to a panel.

Committee Manager Home - Navigates the user back to the Committee Manager home dashboard.

Returned Protocols - Protocols that have been returned to the Principal Investigator (PI).

Search Protocol - Allows the user to search protocols by the Protocol ID, Title, and PI.

2 Investigator

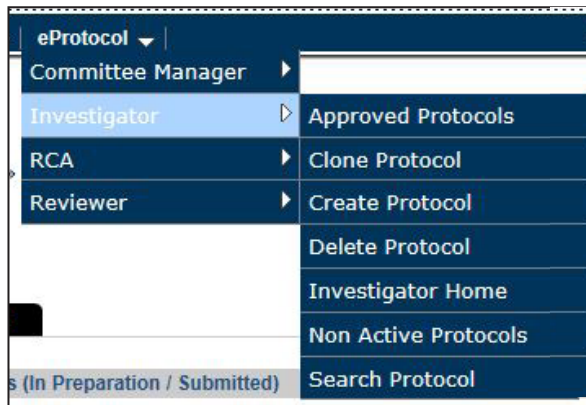


Figure 3.4

Approved Protocols -A list of all protocols that have been approved and are active.

Clone Protocol - Duplicates an existing protocol and assigns a new Protocol ID number.

Create Protocol - Creates a new form and assigns a new Protocol ID number.

Delete Protocol - A list of “In Preparation” protocols (New, Amendment, Continuing Review, etc.) that can be deleted.

Investigator Home - Returns the user back to the Investigator home dashboard.

Non Active Protocols - Protocols that have been closed, expired or withdrawn.

Search Protocol - Allows the user to search protocols by the Protocol ID, Title and PI.



3 RCA

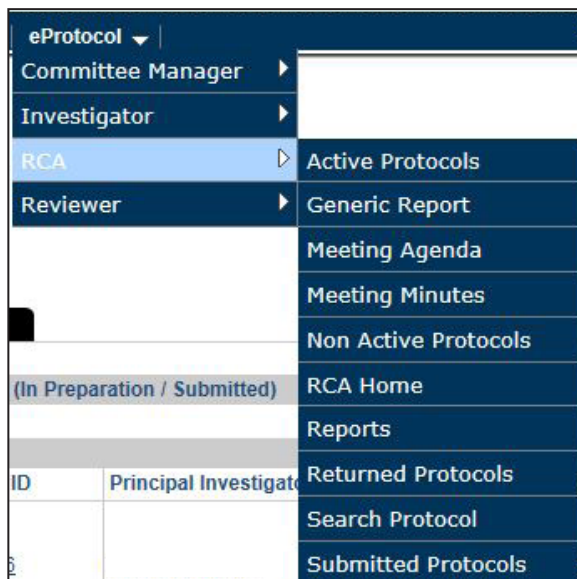


Figure 3.5

Active Protocols - A list of all currently active protocols.

Generic Report - Ad-hoc reporting.

Meeting Agenda - Creating, setup and management of meetings.

Meeting Minutes - A list of protocol submissions to a specific meeting with actions, comments and voting.

Non Active Protocols - Protocols that have been closed, expired, or withdrawn.

RCA Home - Directs the user back to the RCA home dashboard.

Reports - Standard reporting functionality.

Returned Protocols - Protocols that have been returned to the PI.

Search Protocol - Allows the user to search protocols by the Protocol ID, Title and PI.

Submitted Protocols - A view of protocols submitted and currently in progress.

4 Reviewer

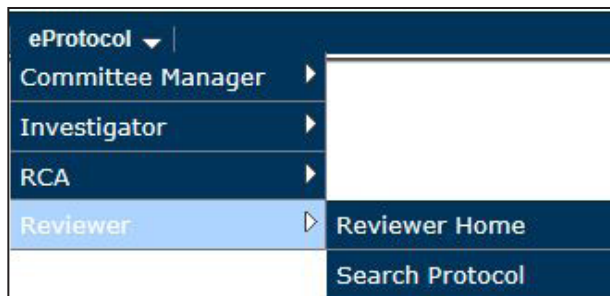


Figure 3.6

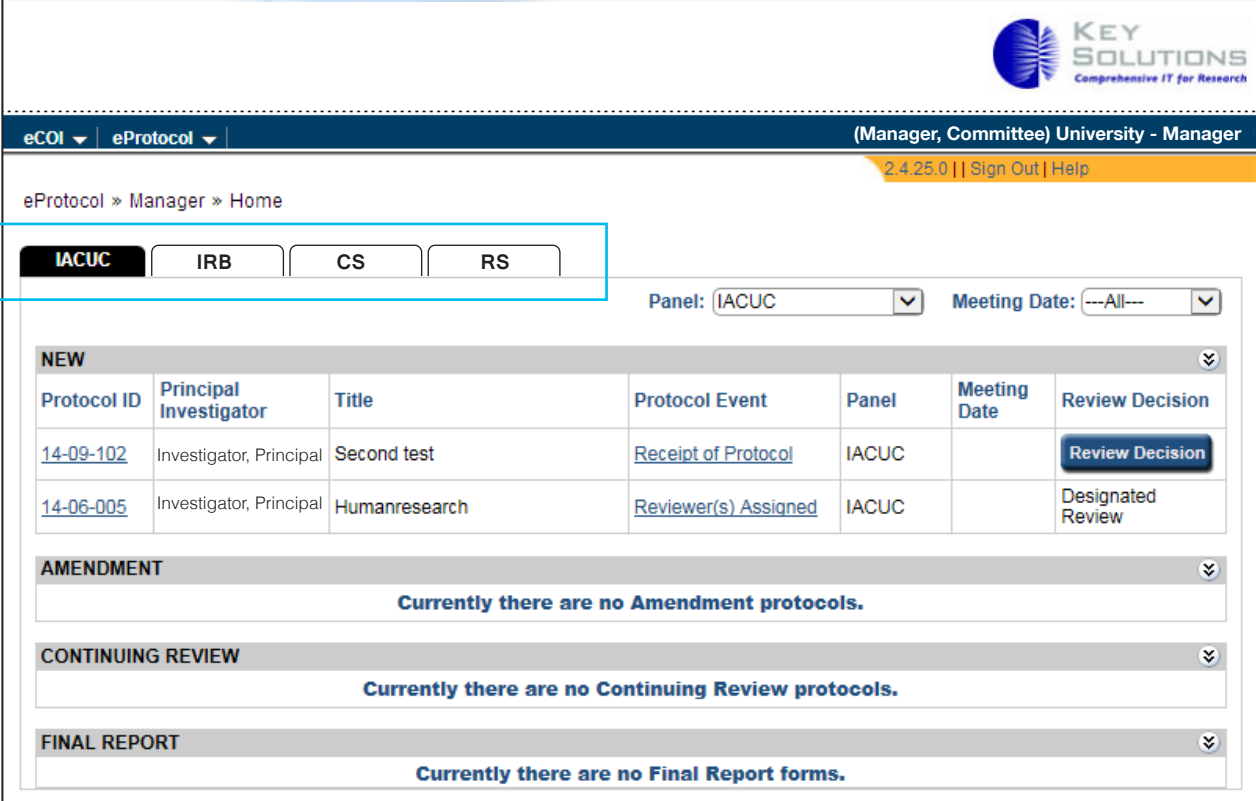
Reviewer Home - Takes the user back to the Reviewer dashboard.

Search Protocol - Allows the user to search protocols by the Protocol ID, Title and PI.

4 ADDITIONAL NAVIGATION

4.1 Module Tabs Navigation

The module tabs are located above the content area. The tabs are used to navigate throughout the modules without navigating to another page. Clicking the module tab highlighted in Figure 4.1 will change the content area so that it pertains to the selected tab. The tab currently being viewed is identifiable by its highlighted color. Clicking the module tab will refresh the dashboard.



The screenshot shows the eProtocol system interface. At the top right is the KEY SOLUTIONS logo with the tagline 'Comprehensive IT for Research'. Below the logo is a navigation bar with 'eCOI' and 'eProtocol' dropdown menus, and the text '(Manager, Committee) University - Manager'. A status bar shows '2.4.25.0 | Sign Out | Help'. The breadcrumb trail is 'eProtocol » Manager » Home'. A row of four tabs is visible: 'IACUC' (highlighted in black), 'IRB', 'CS', and 'RS'. Below the tabs is a 'Panel:' dropdown menu set to 'IACUC' and a 'Meeting Date:' dropdown menu set to '---All---'. The main content area is divided into sections: 'NEW' (with a dropdown arrow), 'AMENDMENT' (with a dropdown arrow), 'CONTINUING REVIEW' (with a dropdown arrow), and 'FINAL REPORT' (with a dropdown arrow). Each section contains a message: 'Currently there are no Amendment protocols.', 'Currently there are no Continuing Review protocols.', and 'Currently there are no Final Report forms.' respectively. The 'NEW' section contains a table with the following data:

Protocol ID	Principal Investigator	Title	Protocol Event	Panel	Meeting Date	Review Decision
14-09-102	Investigator, Principal	Second test	Receipt of Protocol	IACUC		Review Decision
14-06-005	Investigator, Principal	Humanresearch	Reviewer(s) Assigned	IACUC		Designated Review

Figure 4.1

NOTE: For the purpose of this manual, IACUC is used as an example. Based on your research discipline, some options may vary.



4.2 Dashboard Action Buttons

The action buttons are located in the dashboard content area above the grid. Because each dashboard displays different content based on the user's role, the action buttons will be different per dashboard.

The primary function of the action buttons are to manage and monitor protocols. They are a key element in the eProtocol software and will be given a more in depth explanation later in the manual. The primary action buttons are: Create, Clone, Delete and more.

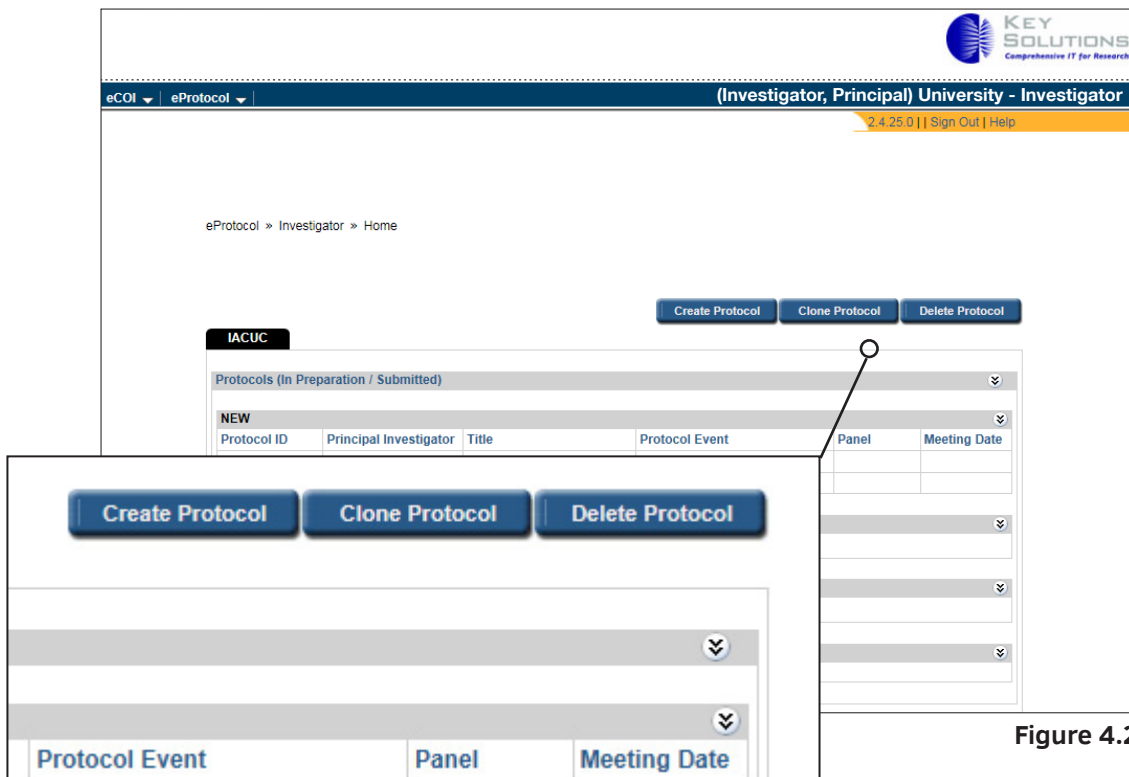


Figure 4.2

Figure 4.2a

5 DASHBOARD GRIDS OVERVIEW & LAYOUT

5.1 Grid Layout & Elements

Though all dashboards will have slight differences pertaining to the role of the user, the overall appearance of the home dashboards are primarily the same. Figure 5.1 shows the standard elements that are displayed in each of the functioning dashboards. A brief explanation of each element is located on page 17.

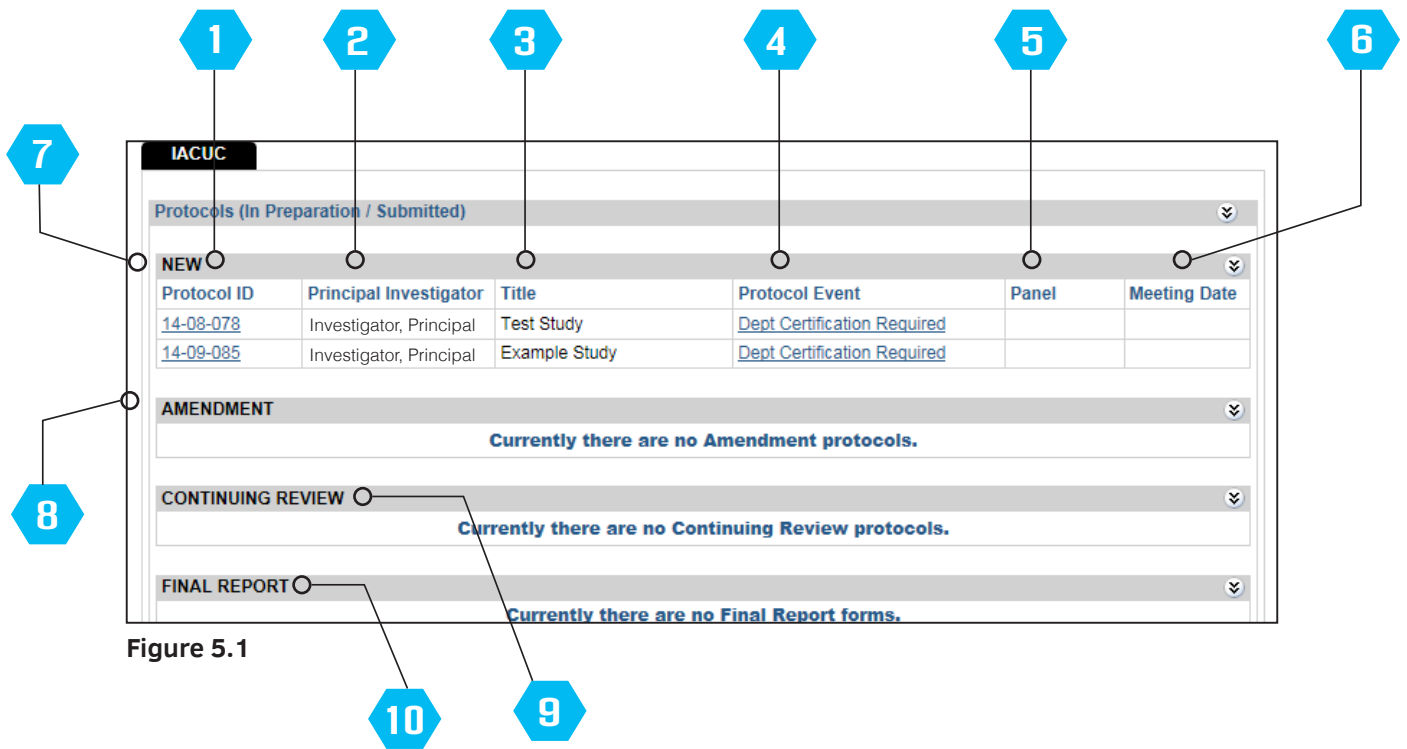


Figure 5.1



Grid Elements

- 1 Protocol ID** - Displays the seven digit identification number that is assigned when the protocol is created. A protocol can be accessed by clicking on the Protocol ID number. Clicking on any protocol number will generate a pop-up window that will allow the user to view and/or edit the protocol.
- 2 Principal Investigator** - Displays the name of the Principal Investigator of a protocol. Clicking on the Principal Investigator column header will change the listing alphabetically.
- 3 Title** - Displays the title of the protocol. Clicking on the Title column header within the grid changes the listing of titles alphabetically.
- 4 Protocol Event** - Displays essential action items for the protocol. The content in the protocol event column differs per role and will be examined more in later pages.
- 5 Panel** - Displays which Committee the protocol has been assigned to.
- 6 Meeting Date** - Displays the meeting date the protocol has been assigned to.
- 7 New** - Lists all new protocols that are currently in progress.
- 8 Amendment** - Lists active protocols that are in the process of being amended.
- 9 Continuing Review** - Lists protocols undergoing annual review.
- 10 Final Report** - Lists all closed or expired protocols.

5.2 Committee Manager Dashboard

Overview

This section of the software manual pertains to the role of the Committee Manager. The next several pages give an in-depth explanation of the action buttons and their functionality, as well as define the **Transactional Events** and **In Preparation** grid sections and the purpose they serve. If you are not a Committee Manager, you may skip pages 18-20 of this manual.

NOTE: Full functionality of the Committee Manager role is further explained in the Committee Manager & RCA Role Manual. Please refer to that manual for more information.

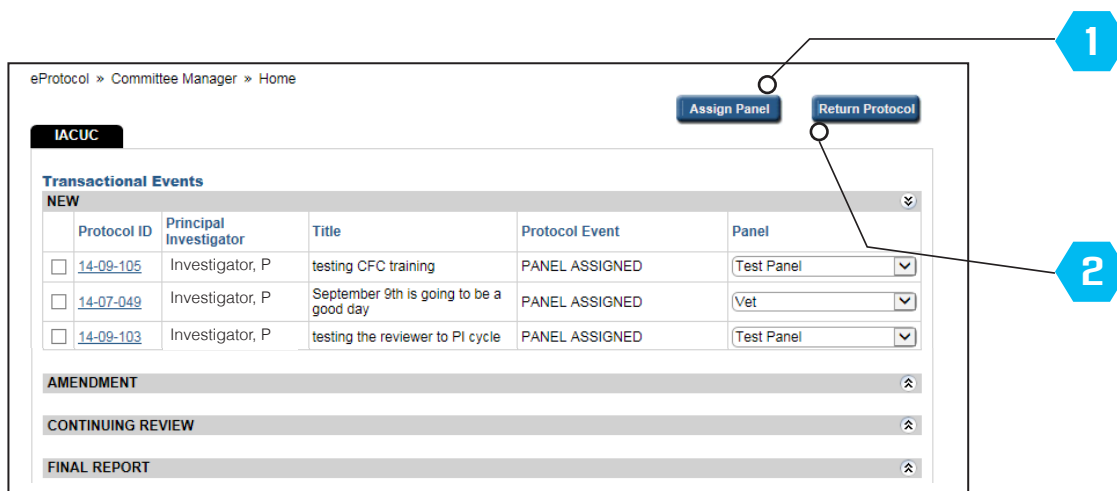


Figure 5.2

Action Buttons and Functionality

- 1 The action button **Assign Panel** is used to assign protocols to a specific panel. In order to assign a protocol, you must first check the box of the Protocol ID number you wish to assign a panel to, as seen in Figure 5.3.

After selecting the Protocol ID number, choose the Committee you would like the protocol assigned to under Panel the drop-down. Once both the protocol and panel have been selected, click the **Assign Panel** button to complete the process.



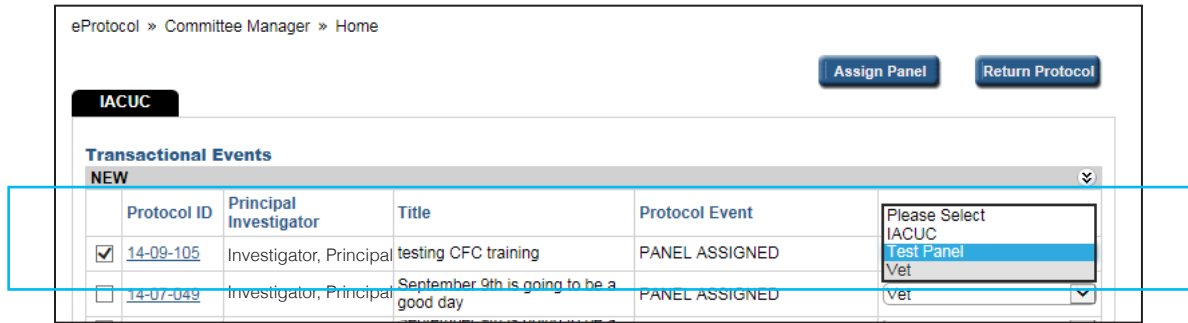


Figure 5.3

- The **Return Protocol** action button follows similar steps to that of the Assign Panel button, however there must be Return Notes added to the protocol before it can be returned. To return a protocol to the PI, you must select the box of the Protocol you wish to return, and click on the **Return Protocol** button.

Interacting with Grid Content

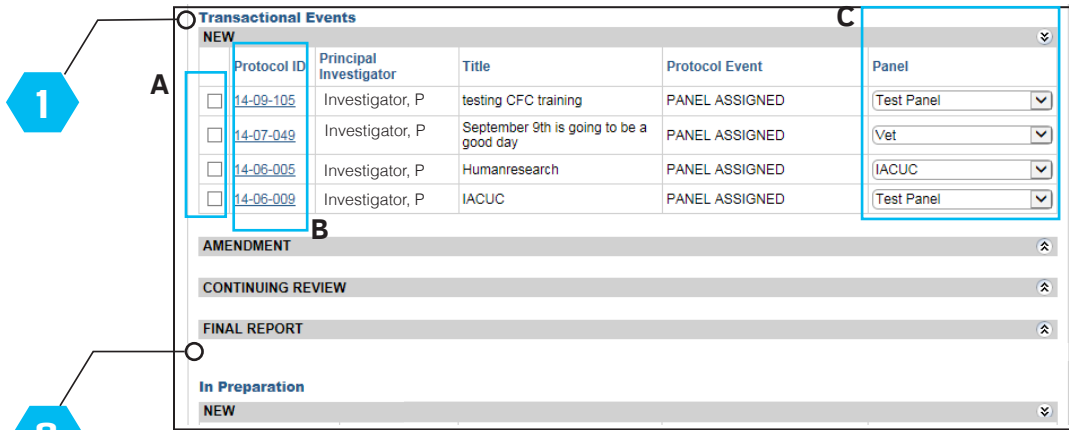


Figure 5.4



1 Transactional Events - Is a part of the content area that categorizes the different grids. One of the grids within the Transactional Events has three elements that are interactive with the user.

A - The outlined blue box on the far left is highlighting the check mark boxes that are a key functional item in eProtocol. In order to assign or return protocols, one of the check mark boxes has to be selected.

B - The protocol numbers highlighted are significant because of their functionality. Clicking on a Protocol ID number as a Committee Manager enables a pop-up window shown in Figure 5.6.

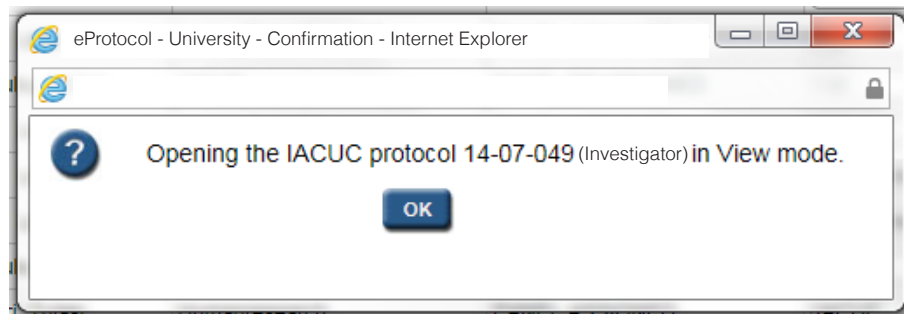


Figure 5.5

C - The drop-down menu under the panel column header lists the committees that the protocol can be assigned to.

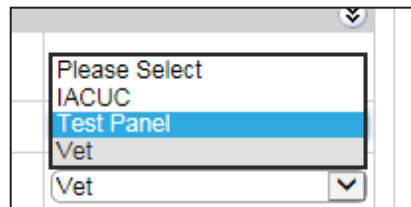


Figure 5.6

2 In Preparation - Lists all new protocols that are currently in progress.



5.3 Investigator Dashboard

Overview

This section of the software manual pertains to the role of the Principal Investigator. The next several pages give an in-depth explanation of the action buttons and their functionality. If you are not a Principal Investigator you may skip pages 21-24 of this manual.

NOTE: Full functionality of the Principal Investigator role is further explained in the Investigator Role Manual. Please refer to that manual for more information.

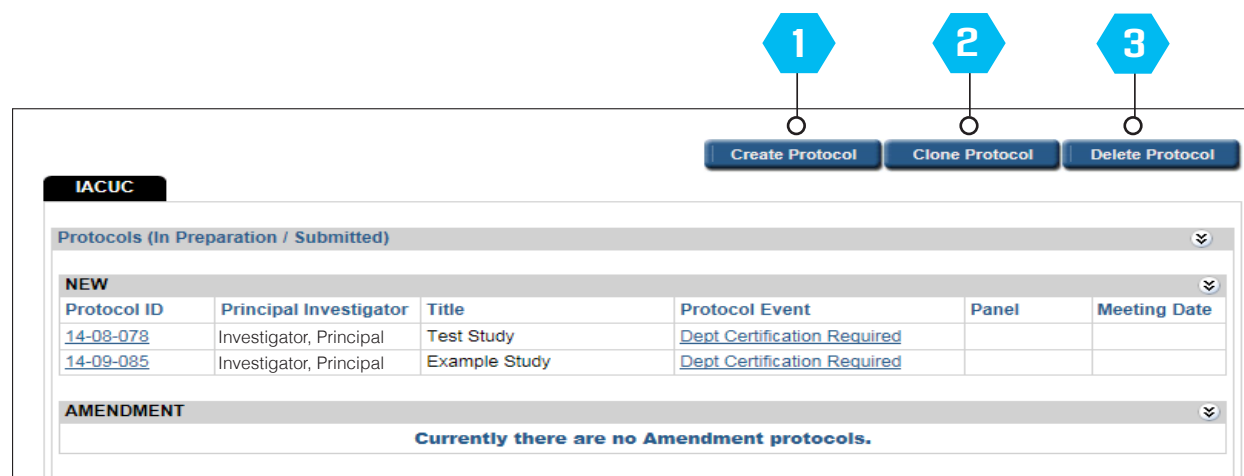


Figure 5.7

Action Buttons and Functionality

- 1 In order to create a new protocol, simply click on the **Create Protocol** button located above the content area. Clicking the action button will direct the user to another page where he/she can create a new protocol [Figure 5.8]. After filling in all of the necessary fields, click the **Create** button to continue drafting a new protocol. Further explanation in creating protocols is found in the Investigator Role Manual.



eProtocol » Investigator » [Home](#) » Create Protocol

Study Title

IACUC

Administrative Application

IACUC

Figure 5.8

- 2 The **Clone Protocol** action button is used to duplicate a protocol. Clicking on this button will direct the user to another page shown in Figure 5.9. Check the circle next to the Protocol ID number you wish to clone followed by clicking the **Clone Protocol** button. A duplicate protocol will appear with a newly assigned Protocol ID number; after which the new protocol can be modified.

eProtocol » Investigator » [Home](#) » Clone Protocol

IACUC [Clone Protocol](#)

All ▼

	Protocol ID	Principal Investigator	Title	Protocol Event	Form Type	Panel	Meeting Date
<input type="radio"/>	14-09-085	Investigator, Principal	Example Study	NEW	NEW		

Figure 5.9

- 3 Clicking on the **Delete Protocol** action button takes the user to a page where a list of 'In Preparation' protocols are displayed as shown in Figure 5.10. Check the box to the left of the Protocol ID number you want to delete. Complete this action by clicking on the **Delete Protocol** button.

eProtocol » Investigator » [Home](#) » Delete Protocol

IACUC [Delete Protocol](#)

<input type="checkbox"/>	Protocol ID	Principal Investigator	Title	Protocol Event	Form Type	Panel	Meeting Date
<input type="checkbox"/>	14-09-085	Investigator, Principal	Example Study	NEW	NEW		
<input type="checkbox"/>	14-08-078	Investigator, Principal	Test Study	NEW	NEW		
<input type="checkbox"/>	14-08-078	Investigator, Principal	Test Study	NEW	NEW		

Figure 5.10



Interacting with Grid Content

The screenshot displays the IACUC dashboard interface. At the top right is the Key Solutions logo. Below it is a navigation bar with 'eCOI' and 'eProtocol' dropdowns, and '(Investigator, Principal) University - Investigator'. A status bar shows '2.4.28.0 | Sign Out | Help'. The breadcrumb trail is 'eProtocol » Investigator » Home'. There are three buttons: 'Create Protocol', 'Clone Protocol', and 'Delete Protocol'. The main content is divided into sections: 'IACUC', 'AMENDMENT', 'CONTINUING REVIEW', 'FINAL REPORT', 'Dept Certifications', 'Approved Protocols', and 'Non Active Protocols'. Callouts 1-4 point to specific grid cells: 1 points to the 'IACUC' section header, 2 points to the 'CONTINUING REVIEW' table, 3 points to the 'Approved Protocols' table, and 4 points to the 'Non Active Protocols' table.

1 IACUC

A Protocols (In Preparation / Submitted)

NEW	Protocol ID	Principal Investigator	Title	Protocol Event	Panel	Meeting Date
	14-09-116	Investigator, Principal	Tumor Pharmacokinetics as the Missing Link between In Vit...	Yet to Submit to IACUC		
	14-09-085	Investigator, Principal	Therapeutic targeting of perinatal ischemia	Dept Certification Required		

B

AMENDMENT
Currently there are no Amendment protocols.

CONTINUING REVIEW

Protocol ID	Principal Investigator	Title	Protocol Event	Panel	Meeting Date	Expiration Date
14-09-110	Investigator, Principal	Breast cancer-macrophage interactions and therapeutic man...	Yet to Submit to IACUC	IACUC		08/22/2016

FINAL REPORT
Currently there are no Final Report forms.

Dept Certifications

Protocol ID	Principal Investigator	Title	Protocol Event	Panel	Meeting Date
14-09-096	Investigator, Principal	test on Sept 5th	Receipt of Dept Certification		

C

D

Approved Protocols

Protocol ID	Principal Investigator	Title	Approval Date	Last Approval Date	Expiration Date	Review Decision	Form Type
14-09-110	Investigator, Principal	Breast cancer-macrophage interactions and therapeutic man...	08/23/2013	10/02/2014	08/22/2016	Designated Review	AMENDMENT
14-09-108	Investigator, Principal	new protocol	09/22/2014	09/22/2014	09/21/2017	Undesignated Review	NEW

3

Non Active Protocols

Protocol ID	Principal Investigator	Title	Approval Date	Last Approval Date	Status/Comments	Form Type
No data available in table						

4

Figure 5.11



1 Protocols (In Preparation/Submitted) - Lists all protocols currently in progress.

A - Clicking any of the Protocol ID numbers as an Investigator results in a pop-up window to open the protocol, as seen in Figure 5.12.

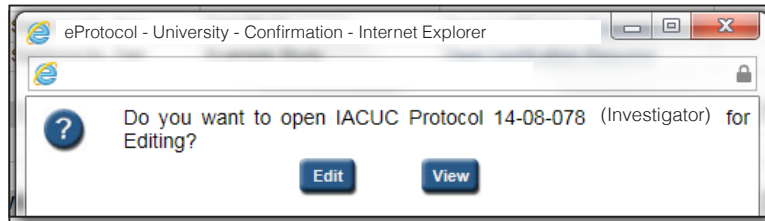


Figure 5.12

B - A protocol may be accessed by clicking on the active links in the Protocol Event column. The pop-up window generated is the same as the one in Figure 5.13.

2 The **Department Certifications** grid is used for protocols that have been submitted to the Department Chair for certification.

C - Protocol ID numbers will allow the user to open the protocol.

D - The Protocol Event column contains active links within the Department Certifications grid. The links generate a pop-up window for the Department Chair to certify a protocol and submit it back to the Principal Investigator [Figure 5.13].

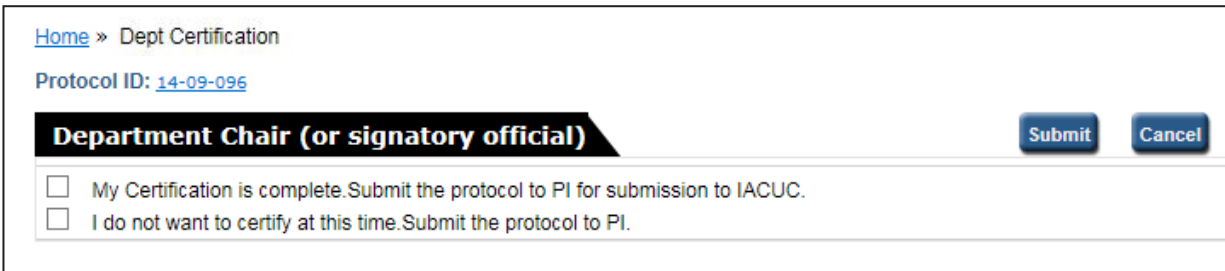


Figure 5.13

3 **Approved Protocols** are a list of all protocols that have been approved and are currently active. This is where a protocol can be opened for viewing or to start an amendment.

4 **Non Active Protocols** are protocols that are inactive.



5.4 RCA Dashboard

Overview

This section of the software manual pertains to the role of the Research Compliance Administrator (RCA). The next several pages give an in-depth explanation of the action buttons and their functionality. If you are not a RCA, you may skip pages 25-30 of this manual.

NOTE: Full functionality of the RCA role is further explained in the Committee Manager & RCA Role Manual. Please refer to that manual for more information.

The screenshot shows the IACUC dashboard interface. At the top right is the Key Solutions logo. Below it is a navigation bar with 'eCOI' and 'eProtocol' dropdowns, and '(Administrator, Research) University - RCA'. A status bar shows '2.4.28.0 | Sign Out | Help'. The breadcrumb trail is 'eProtocol » RCA » Home'. The main section is titled 'IACUC' and includes a filter for 'Panel: IACUC' and 'Meeting Date: ---All---'. The 'NEW' section contains a table with the following data:

Protocol ID	Principal Investigator	Title	Protocol Event	Panel	Meeting Date	Review Decision
14-07-068	Investigator, Principal	testing again on Junly 25th	Responses Received (Cycle 1)	IACUC	10/22/2014	Panel Manager Review
14-09-102	Investigator, Principal	Second test	Reviewer(s) Assigned	IACUC	09/24/2014	Full Review
14-09-117	Investigator, Principal	September 12, 2014 - Non-Surgical Procedures	Responses Received (Cycle 2)	IACUC		Designated Review
14-06-005	Investigator, Principal	Humanresearch	Reviewer(s) Assigned	IACUC		Designated Review

Below the table are three summary sections:

- AMENDMENT:** Currently there are no Amendment protocols.
- CONTINUING REVIEW:** Currently there are no Continuing Review protocols.
- FINAL REPORT:** Currently there are no Final Report forms.

Figure 5.14

Interacting with Grid Content

eProtocol » RCA » Home

IACUC

B Panel: **C** Meeting Date:

A

NEW	Protocol ID	Principal Investigator	Title	D	Protocol Event	Panel	Meeting Date	Review Decision
14-09-102	Investigator, Principal	Second test	Reviewer(s) Assigned	IACUC	09/24/2014	Full Review		
14-09-105	Investigator, Principal	testing CFC training	Reviewer(s) Assigned	Test Panel		Designated Review		
14-07-049	Investigator, Principal	September 9th is going to be a good day	Comments Sent (Cycle 1)	Vet		Designated Review		
14-09-103	Investigator, Principal	testing the reviewer to PI cycle	Recommended for Approval	Test Panel		Designated Review		
14-09-092	Investigator, Principal	testing Dept Chair WF	Reviewer(s) Assigned	Vet		Designated Review		
14-06-008	Investigator, Principal	IACUC	Comments Sent (Cycle 1)	Vet		Designated Review		
14-09-086	Investigator, Principal	test on Sept 5th	Reviewer(s) Assigned	Vet		Designated Review		
14-08-076	Investigator, Principal	testing on August 5th	Receipt of Protocol	Test Panel			Review Decision	
14-07-068	Investigator, Principal	testing again on July 25th	Receipt of Protocol	Test Panel			Review Decision	
14-07-065	Investigator, Principal	testing	Responses Received (Cycle 3)	Vet			Review Decision	
14-06-005	Investigator, Principal	Humanresearch	Reviewer(s) Assigned	IACUC		Designated Review		
14-06-009	Investigator, Principal	IACUC	Panel Manager Review	Test Panel	07/06/2014	Panel Manager Review		

AMENDMENT [Currently there are no Amendment protocols.](#)

CONTINUING REVIEW [Currently there are no Continuing Review protocols.](#)

FINAL REPORT [Currently there are no Final Report forms.](#)

Figure 5.15

A - Clicking on a Protocol ID number will generate a pop-up as seen in Figure 5.16. You may view the protocol by clicking on either of the action buttons.



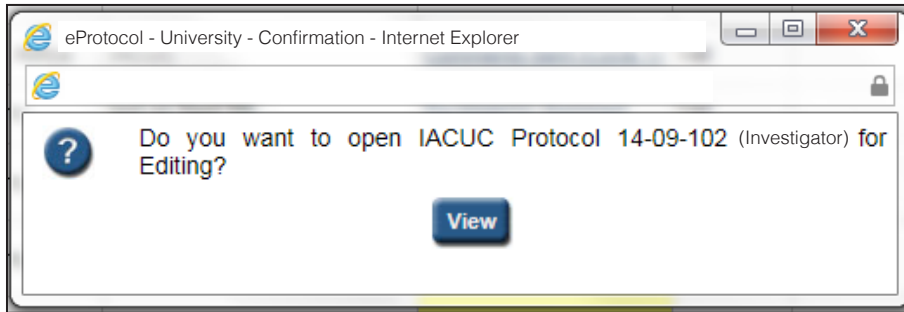


Figure 5.16

B - The **Panel** drop-down allows the RCA to filter protocols based on the committees it has been assigned to [Figure 5.17].

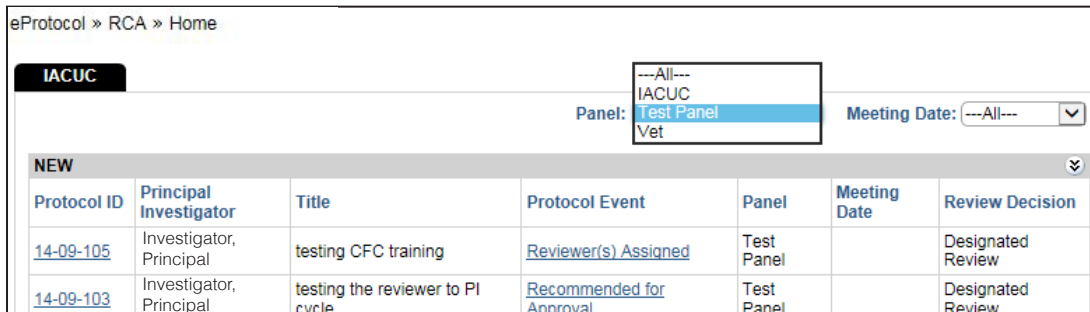


Figure 5.17

C - The **Meeting Date** drop-down allows the RCA to filter protocols by their assigned meeting date [Figure 5.18].

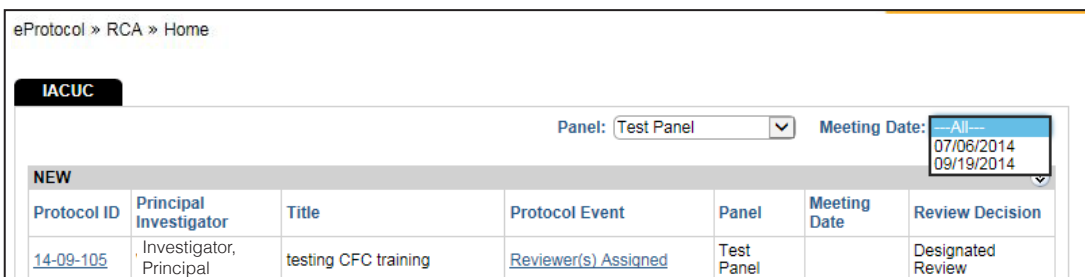


Figure 5.18



D - The Protocol Event column within the dashboard grid holds several active links [Figure 5.15]. Clicking on the **Receipt of Protocol** link will direct the user to a page like Figure 5.19. This is where the RCA assigns reviewers to a protocol.

eProtocol » Manager » Home » Assign Reviewers
 Protocol ID: [14-09-102](#) (Investigator, Principal)
 Panel: IACUC Meeting Date: 09/24/2014 Review Type: Please Select

Panel Member	Presenter	PR	SR	Rad.Saf	BioS.	Expert	NPR
Member, Panel	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Member, Panel	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Member, Panel	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Member, Panel	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Member, Panel	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Member, Panel	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Member, Panel	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Member, Panel	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Member, Panel	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Figure 5.19

Reviewer(s) Assigned [Figure 5.20] allows the RCA to review and comment on active protocols.

eProtocol » RCA » Home » Comments
 Protocol ID: [14-09-102](#) (Investigator, Principal)
 Review Type: Full Review
 Cycle: 1

Get Protocol Guidelines Reviewers Meeting Minutes
 Write Comment(s)

Comments
 Please click on Write Comment(s) to add Comment(s).

Figure 5.20



The **Comments Sent** [Figure 5.21] and **Responses Received** [Figure 5.22] navigates the user to a page where comments and/or direct responses can be viewed. Refer to Figure 5.15 on page 26 to view the location of these links on the dashboard.

eProtocol » Manager » [Home](#) » Comments

Protocol ID: [14-07-049](#) (Investigator, Principal)
 Review Type: Designated Review
 Cycle: **1**

[Get Protocol](#) [Guidelines](#) [Reviewers](#) [Meeting Minutes](#)
[Write Comment\(s\)](#) [Show All Comments](#)

Comments

Section: General Questions

Title: WL1 **Reviewer:** (Presenter/Primary) **Date:** 09/09/2014

made changes in the general section

Response Necessary for Approval
 Suggestion Not Necessary for Approval

Notes

Reviewer	Recommended	Notes to IACUC	Date Submitted
Cycle: 1			
Reviewer, Primary	NO		09/09/2014

Figure 5.21

eProtocol » Manager » [Home](#) » Comments

Protocol ID: [14-07-065](#) (Investigator, Principal)
 Review Type: Designated Review
 Cycle: **1 2 3**

[Get Protocol](#) [Guidelines](#) [Reviewers](#) [Meeting Minutes](#)
[Write Comment\(s\)](#) [Show All Comments](#)

Comments

Section: Personnel Information

Title: WL1 **Reviewer:** Reviewer, Primary **Date:** 07/31/2014

comments from PM after the Reviewer in cycle 1

are more people needed than this?
 Fusce consectetur lobortis ante nec luctus. Suspendisse bibendum mollis ipsum sed vehicula. Quisque auctor vestibulum sem id mattis. Phasellus in eleifend nisi, at hendrerit turpis. Nam iaculis diam a facilisis feugiat. Duis laoreet metus et lectus dictum, non bibendum sem scelerisque. Mauris sollicitudin mollis est. Sed vitae velit eu purus sodales mattis volutpat vel mi. Suspendisse posuere ullamcorper rhoncus. Etiam lobortis magna a mi cursus porta. Donec ac tristique felis, non placerat velit.
 Aliquam orci diam, dapibus sed sagittis at, rutrum sit amet neque. Vestibulum rhoncus tempus condimentum. Proin est massa, pulvinar at turpis vitae, ultrices accumsan elit. Aliquam consequat, arcu in lacinia suscipit, risus diam imperdiet lacus, quis malesuada velit purus ac felis. Duis commodo sit amet turpis nec malesuada. Donec eget tellus mauris. Phasellus nec tincidunt enim. Maecenas et blandit leo. Pellentesque vestibulum dictum eros, sed pretium tortor mattis nec. Ut molestie metus elit, et ultricies massa tempus ac. Mauris sollicitudin tellus at nulla pellentesque sagittis. Etiam ut nisi metus. Sed eu fermentum turpis. Suspendisse a molestie enim.

Response Necessary for Approval
 Suggestion Not Necessary for Approval

Response **Date:** 08/01/2014

nice use of latin text

Figure 5.22



The **Recommended for Approval** link displays Reviewers and their recommendation [Figure 5.23]. Refer to Figure 5.15 on page 26 to see how we got to this page

eProtocol » Manager » [Home](#) » Comments

Protocol ID: [14-09-103](#) (Investigator, Principal)

Review Type: Designated Review

Cycle: [1](#) [2](#) [3](#)

[Get Protocol](#) [Guidelines](#) [Reviewers](#) [Meeting Minutes](#)
[Write Comment\(s\)](#) [Show All Comments](#)

Comments

Section: Non-Surgical Procedure Details

Title: BG1 **Reviewer:** Reviewer, Primary (Presenter/Primary) **Date:** 09/15/2014

added anesthetic agent

Response Necessary for Approval Suggestion Not Necessary for Approval

Response **Date:** 09/15/2014

modified protocol

Section: Procedure Relationships

Title: BG2 **Reviewer:** Reviewer, Primary (Presenter/Primary) **Date:** 09/15/2014

this needs detail

Response Necessary for Approval Suggestion Not Necessary for Approval

Response **Date:** 09/15/2014

modified protocol 2

Notes

Reviewer	Recommended	Notes to IACUC	Date Submitted
Cycle: 3			
Reviewer, Primary	YES		09/15/2014
Cycle: 2			
Reviewer, Primary	YES	Vet review completed	09/15/2014

Figure 5.23

And lastly, **Panel Manager Review** generates a pop-up allowing the user to review the panel content.



5.5 Reviewer Dashboard

Overview

This section of the software manual pertains to the role of the Reviewer. The next several pages give an in-depth explanation the main functionality of the dashboard. If you are not a Reviewer, you may skip pages 31-32 of this manual.

NOTE: Full functionality of the Reviewer role is further explained in the Reviewer Role Manual. Please refer to that manual for more information.

The screenshot shows the 'IACUC' dashboard for a reviewer. It features a navigation bar with 'eProtocol' and 'University - Reviewer'. The main content area is titled 'IACUC Member (Protocols for Review)' and is divided into four sections: 'NEW', 'AMENDMENT', 'CONTINUING REVIEW', and 'FINAL REPORT'. The 'NEW' section contains a table with the following data:

Role	Protocol ID	Principal Investigator	Title	Protocol Event	Panel	Meeting Date
Presenter	14-09-092	Investigator, Principal	testing Dept Chair WF	Assigned as Reviewer	Vet	

The 'AMENDMENT', 'CONTINUING REVIEW', and 'FINAL REPORT' sections each display the message: 'Currently there are no [category] protocols/forms.'

Figure 5.24

Protocols for Review

A - Clicking on a Protocol ID number while logged in as a Reviewer will generate a pop-up window as shown in Figure 5.25. The Reviewer has the option to view protocols and only select Reviewers have editing capabilities.

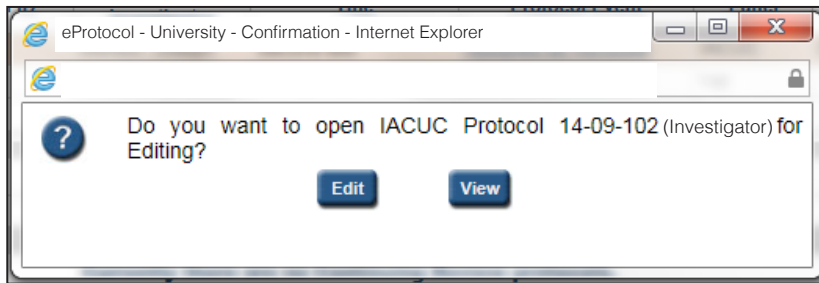


Figure 5.25

B - Clicking on the **Assigned as Reviewer** link directs the user to another page as shown in Figure 5.26. On this page the Reviewer has the ability to view, add comments and send their recommendation to the panel manager.



Figure 5.26



6 SEARCH PROTOCOL FUNCTIONALITY

Overview

No matter your role, all members have the ability to search a protocol. A user can access the search protocol page by first selecting the eProtocol menu on the top menu bar. Hover your mouse over your job title and click on the menu tab titled **Search Protocol**.

You will be directed to a search page like the one shown in Figure 6.1. On this screen, you may search for all protocols that you have access rights to. Protocols can be searched by Title, PI Name, and Protocol ID. Searches can be saved for future use. Saved searches maintain the search criteria for faster subsequent searches.

eProtocol » Investigator » [Home](#) » Search Protocol

Search **Clear** **Save** **Cancel**

IACUC

Protocol ID	<input type="text"/>	Study Title	<input type="text"/>
Principal Investigator	<input type="text"/>	Investigator	<input type="text"/>
Form Type	---Please Select---	Panel	---Please Select---
Department	---Please Select---	Meeting Date	<input type="text"/>
Form Name	---Please Select---		
Sponsor	---Please Select---	SPO #	<input type="text"/>
Animal Type	---Please Select---		

Figure 6.1

7 SUMMARY

You have successfully completed the General Functionality and Dashboard Manual. We hope you have a better understanding of the overall functionality and look of eProtocol. Please see the next eProtocol manual based on your role for an in-depth explanation of the functionality and requirements specific to your role.

If you are a Principal Investigator, please refer to the Investigator Role Manual, to learn how to properly create and submit a protocol.

If your role is a Committee Manager or RCA, please see the Committee Manager and RCA Role Manual and explore the requirements and functionality accessible.

If you are a Reviewer, please refer to the Reviewer Role Manual for a detailed description of functionality and requirements.

