



Navigating Huron: The Basics

Human Research Protection Program



This PowerPoint will give you a quick overview of how to navigate your Dashboard, Study Workspace, and IRB Workspace.



Dashboard

When you log into Huron, your landing page will be your **Dashboard**. Your Dashboard is the starting point for finding items that need your attention and performing some basic tasks.

IRB Stage

TEXAS A&M UNIVERSITY

Hello, Heather Cline [Switch User](#)

Dashboard COI IRB

Page for Heather Cline [Help](#)

Create ▾

Recently Viewed

Recent Pinned

- STUDY2023-0039: Student Success ☆
- STUDY2023-0040: Print ☆

My Inbox My Reviews

My Inbox

Filter by [?](#) ID ▾ Enter text to search [Q](#) [+](#) Add Filter [⚙](#)

[X](#) Clear All

ID	Name	Date Created	Date Modified	State	Coordinator
STUDY2023-0039	Student Success	6/14/2023 9:06 AM	6/16/2023 1:08 PM	Pre-Submission	
DP00011202	Disclosure Profile for Heather Cline	12/15/2022 12:08 PM	4/7/2023 2:17 AM	Action Required	Heather Cline

2 items

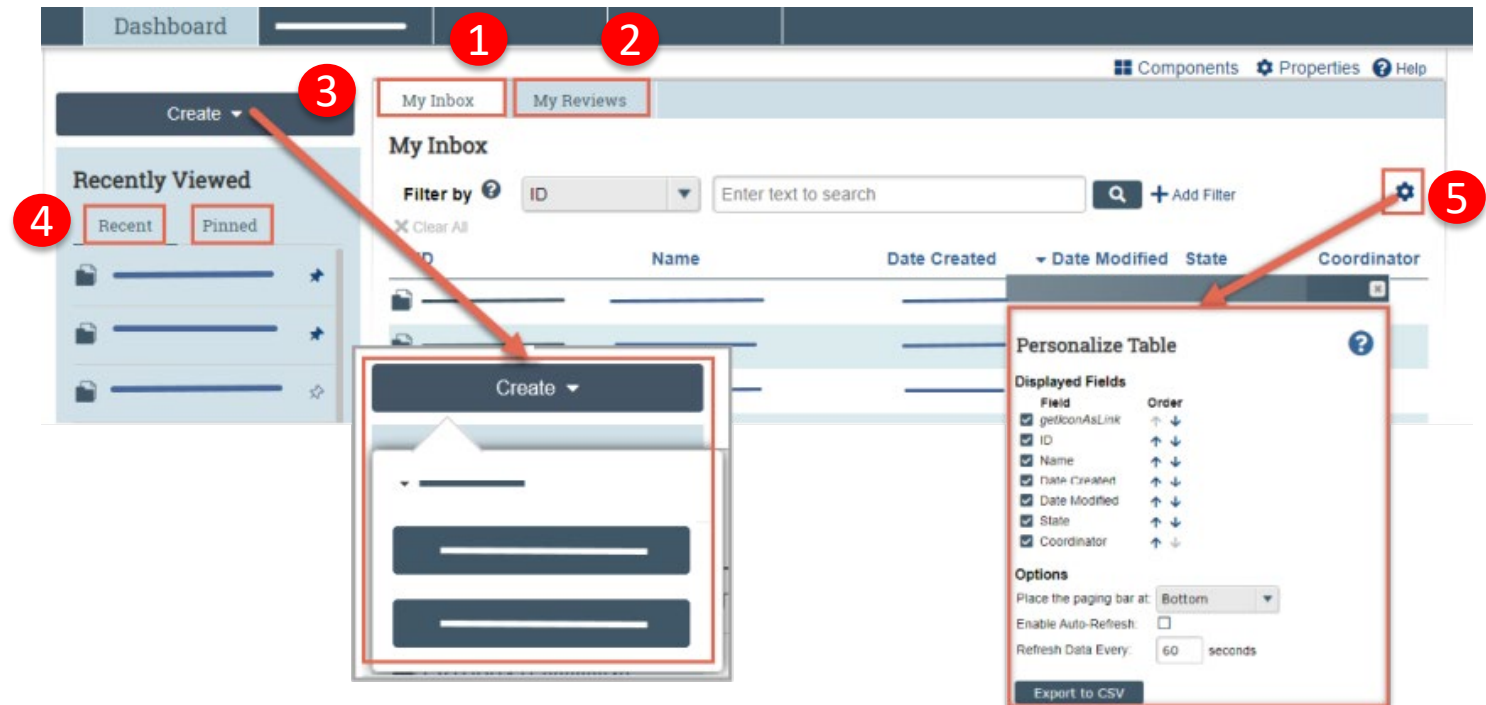
◀ page 1 of 1 ▶

25 / page

Navigating the Dashboard

From your Dashboard, you will see:

1. **My Inbox:** Will list items that require you to take action.
2. **My Reviews:** Items assigned to you to review. These are a subset of the items in My Inbox.
3. **Create menu and buttons:** Actions you can perform from your Dashboard, including Create New Study and initiate a Report New Information form.
4. **Recently Viewed:**
 - **Recent:** The last several items you viewed. Scroll through this list to find an item you worked on recently.
 - **Pinned:** You can pin items in the Recently Viewed section for quick and easy access. This is where those pinned items are listed.
5. **Personalize Table:** You can alter the tables displayed on the dashboard by using the Personalize Table gear icon.



From your Dashboard you can identify what actions are needed

1. From your Dashboard, you can identify if there are any actions needing your attention by reviewing the state of your submissions in **My Inbox**.
2. The **state** of a submission gives a clue as to what to do next. For example, “Pre-Submission” means you haven’t submitted the study, and “Clarification Requested” means that you are being asked to provide additional information on your pending submission.
3. To open your submission and continue working on it, select either **the folder icon** or the **name** of your study.

The screenshot displays the IRB Stage dashboard for Denise Puga. The 'My Inbox' tab is selected, showing a table of submissions. Red annotations highlight key elements: '1' points to the 'My Inbox' tab; '2' points to the 'State' column header; and '3' points to the folder icon and name of the first submission, 'STUDY2023-0019 TAMU Demo for COI'.

ID	Name	Date Created	Date Modified	State
STUDY2023-0019	TAMU Demo for COI	5/8/2023 10:34 AM	5/8/2023 10:51 AM	Pre-Review Completed
STUDY2023-0018	D	5/2/2023 12:29 PM	5/2/2023 2:42 PM	Pre-Submission
STUDY2023-0014	title	4/4/2023 2:36 PM	5/2/2023 2:16 PM	Clarification Requested (Pre-Review)



Study Workspace

Once you open your submission, you will be led to your **Study Workspace**.

Your Study Workspace allows you to edit your application, submit forms (e.g., modifications, reportable new information), assign ancillary reviewers, and view the history of your submission. Proceed to the next slide to learn more about the functionality of the Study Workspace.

Clarification Requested (Pre-Review)

Entered IRB: 6/26/2023 10:24 AM
Last updated: 6/26/2023 2:16 PM

Next Steps

- View Study
- Printer Version
- Assign Coordinator
- Assign Primary Contact
- Assign PI Proxy
- Manage Ancillary Reviews
- Manage Guest List
- Add Related Grant
- Create Ad Hoc Certifications

STUDY2023-0043: HRPP staff

Principal investigator: Heather Cline
Submission type: Initial Study
Primary contact: Heather Cline
PI proxies:
PI Department: Vice President For Research

IRB office: IRB 1
IRB coordinator: Denise Puga



History	Funding	Contacts	Documents	IRB Assignment Details	Reviews	Snapshots
Filter by ? Activity ▼ <input type="text" value="Enter text to search"/> 🔍 + Add Filter ✕ Clear All						
Activity	Author				Activity Date	
🔍 Clarification Requested	Puga, Denise A				6/26/2023 2:16 PM	
Study locations were not included.						

Study Workspace: Submission Workflow

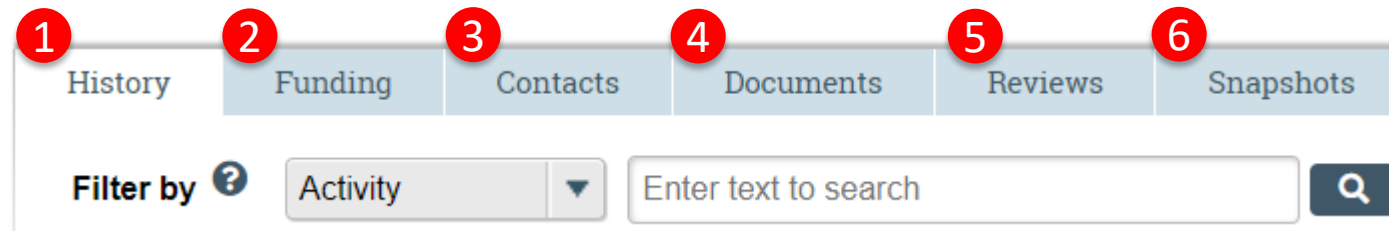
The submission workflow allows you to track the progress of your study.



- **Pre-Submission:** The study has not been submitted to HRPP/IRB for review. The study still sits with the PI /research team.
- **Pre-Review:** The submission is with the HRPP/IRB office for review
- **Clarification Requested:** Clarification is requested, and the submission is open to the study team for response.
- **IRB Review:** The study has been assigned for review by the IRB.
- **Modifications Required:** Modifications are requested by the reviewer(s) prior to final determination.
- **Post-Review:** The study has been reviewed and the determination letter will be generated shortly.
- **Review Complete:** The review of the submission is complete and the study is now active / approved.

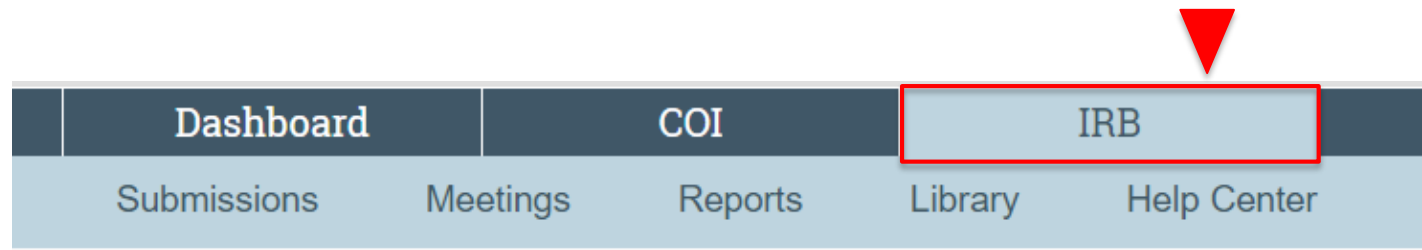
Study Workspace: Basic study information

Use the study workspace navigator to access information about your study.



- 1. History:** This tab lists the activity taken on a submission including any comments, attachments, or correspondence added.
- 2. Funding:** Provides all funding sources associated with the submission along with related grant information, if applicable.
- 3. Contacts:** This tab lists all individuals with study involvement (i.e., PI, Study Team, Other Study Members, Guests).
- 4. Documents:** This tab includes all study related and site related documents including documents on drugs, devices, and international research, if applicable.
- 5. Reviews:** This tab will list all ancillary reviews including the reviewers' comments, and Reviews containing the latest pre-review, committee and/or non-committee reviews, determinations (e.g., approval date), review/risk level, notes, missing materials, and checklists completed by the reviewers.
- 6. Snapshots:** Provides a snapshot of the entire study including attachments submitted at different states of the submission (e.g, approved stated, pre-submission state).

IRB Workspace



While your Dashboard is a quick and easy way to access submissions requiring your attention, the **IRB Workspace** is your primary source for all things IRB.

The IRB workspace allows you to see and sort through all your IRB submissions, run reports, access important templates and HRPP guidance documents, and view Huron help tools.

IRB Workspace: Submission Tab

The **Submission** tab in the IRB Workspace allows you to view and sort through all your submissions, including but not limited to: your submissions currently undergoing review, active studies for which you are listed as study personnel, and studies managed by an external IRB. The submission tab has a navigation menu that allows you to sort through your submissions. You can learn more about this navigation menu on the next few slides.

IRB > Submissions

Submissions

Search

Create New Study

Report New Information

In-Review Active New Information Reports External IRB Relying Sites All Submissions Archived

Filter by Enter text to search + Add Filter x Clear All

ID	Name	Date Modified	State	PI First Name	PI Last Name	Coordinator First Name	Coordinator Last Name	Submission Type
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Submission tab: Navigation Menu

The screenshot shows a navigation menu with seven tabs: In-Review, Active, New Information Reports, External IRB, Relying Sites, All Submissions, and Archived. Below the tabs is a search bar with a dropdown menu set to 'ID' and a search input field containing 'Enter text to search'. To the right of the search bar are buttons for '+ Add Filter' and 'x Clear All', and a gear icon for settings. Below the search bar is a table header with columns: ID, Name, Date Modified, State, PI First Name, PI Last Name, Coordinator First Name, Coordinator Last Name, and Submission Type.

1. **In-Review:** Submissions undergoing IRB review.
2. **Active:** All approved submissions, as well as non-human research, human research not engaged, expired, and suspended submissions.
3. **New Information Reports:** New information reported to the IRB. Report any of the events listed [here](#) to the IRB within five (5) working days of the research staff having knowledge of the event.
4. **External IRB:** All studies managed by an external IRB.
5. **Relying Sites:** All participating sites relying on the local IRB as the single IRB of record.
6. **All Submissions:** All submissions, in any state.
7. **Archived:** All closed, disapproved, discarded, and terminated submissions.

Submission tab: Navigation Menu

The screenshot shows the Submission tab interface. At the top right is a search bar with a magnifying glass icon and a red circle '3' next to it. Below the search bar is a navigation menu with tabs: In-Review, Active, New Information Reports, External IRB, Relying Sites, All Submissions, and Archived. Below the navigation menu is a filter section with a red circle '1' next to the 'Filter by' dropdown. The dropdown menu is open, showing options: ID, Name, Date Modified, State, PI First Name, PI Last Name, Coordinator First Name, Coordinator Last Name, and Submission Type. To the right of the filter section is a search input field with a magnifying glass icon and a red circle '2' next to the '+Add Filter' button. Below the filter section is a table with columns: ID, Date Modified, State, PI First Name, PI Last Name, Coordinator First Name, Coordinator Last Name, and Submission Type. The table contains one row with the following data: ID: STUDY2023, Date Modified: 10:50 AM, State: Pre-Submission, PI First Name: Denise, PI Last Name: Puga, Coordinator First Name: (empty), Coordinator Last Name: (empty), Submission Type: Initial Study. Below the table is a pagination bar showing 'page 1 of 1' and '25 / page'.

1. Filter by:

- Filter by allows you to filter columns to show specific data.
- Note: it's recommended to use the % before the first character typed to get all possible records with the specific characters.
 - Example: %Aggies - this will show all records containing Aggies.

2. +Add Filter: Combines multiple filter criteria.

3. Search: Allows you to search for any study record.

Submission tab: Navigation Menu

The screenshot shows the Submission tab interface. On the left, there is a navigation menu with two buttons: 'Create New Study' (callout 1) and 'Report New Information' (callout 2). The main area features a search bar (callout 3) and a filter bar. Below the filter bar is a table with columns: ID, Name, Date Modified, State, PI First Name, PI Last Name, Coordinator First Name, Coordinator Last Name, and Submission Type. A single row is visible with the following data: STUDY2023-0032, Denise, 6/5/2023 10:50 AM, Pre-Submission, Denise, Puga, and Initial Study. At the bottom of the table, it says '1 items' and 'page 1 of 1'. On the right side, there is a 'Personalize Table' panel (callout 4) with a list of displayed fields and their order, and options for pagination and auto-refresh.

- 1. Create New Study:** Click to create a new IRB application.
- 2. Report New Information:** Click to report any of the events listed [here](#) to the IRB within five (5) working days of the research staff having knowledge of the event. This form is also used to submit a study's Administrative Check In.

- 3. ?:** Provides additional information about the item it is next to. The help button is found through out all submissions.
- 4. Personalize Table (Gear Symbol):** Allows you to move the table headers around to better suit your needs.

Personalize Table

Displayed Fields

Field	Order
<input checked="" type="checkbox"/> getIconAsLink	↑ ↓
<input checked="" type="checkbox"/> ID	↑ ↓
<input checked="" type="checkbox"/> Name	↑ ↓
<input checked="" type="checkbox"/> Date Modified	↑ ↓
<input checked="" type="checkbox"/> State	↑ ↓
<input checked="" type="checkbox"/> PI First Name	↑ ↓
<input checked="" type="checkbox"/> PI Last Name	↑ ↓
<input checked="" type="checkbox"/> Coordinator First Name	↑ ↓
<input checked="" type="checkbox"/> Coordinator Last Name	↑ ↓
<input checked="" type="checkbox"/> Submission Type	↑ ↓

Options

Place the paging bar at:

Enable Auto-Refresh:

Refresh Data Every: seconds

[Export to CSV](#)

IRB Workspace: Meeting tab

The Meeting Tab is for HRPP and IRB members only. This section will be blank for all other users.

The screenshot shows the IRB Meeting tab interface. The navigation bar includes 'Dashboard', 'COI', and 'IRB' (highlighted with a red box). Below the navigation bar, 'Submissions', 'Meetings' (highlighted with a red box), 'Reports', 'Library', and 'Help Center' are visible. A red triangle points to the 'Meetings' tab. The main content area is titled 'IRB > Meetings' and 'Meetings'. Below the title, there are three tabs: 'Upcoming Meetings' (annotated with a red circle '1'), 'Past Meetings' (annotated with a red circle '2'), and 'Committees' (annotated with a red circle '3'). A search bar is present with a 'Filter by' dropdown set to 'Name' and a search input field. Below the search bar, a table header is visible with columns: 'Name', 'State', 'Location', 'Time', 'Committee', and 'Agenda Items'.

- 1. Upcoming Meetings:** If your study is assigned to a meeting, you will be able to see the dates / times of upcoming meetings.
- 2. Past Meetings:** If your study was assigned to a meeting, the date / time of that meeting will appear.
- 3. Committees:** Lists all members on the IRB.

IRB Workspace: Reports tab

IRB > Reports

Reports

Standard Reports Custom Reports

The reports show only the submissions you have permission to view.

Name	Description
All Multi-Site or Collaborative Studies Where This Institution is the IRB of Record	Report of all studies where the institution is the sIRB
Studies Involving Students	Report of studies involving students
Studies Involving Children	Report of studies involving children

1. **Standard Reports:** Reports provided by Huron that any user can run.
2. **Custom Reports:** Reports created by special request customized to the user, if the report is not already available in standard reports.
 - Note: the reports will only contain submissions that you have permission to view (e.g., submissions where you are the PI / proxy, etc).

IRB Workspace: Library

The screenshot shows the IRB Workspace Library interface. At the top, there is a navigation bar with tabs for Dashboard, COI, IRB, Submissions, Meetings, Reports, Library, and Help Center. The IRB tab is highlighted with a red box and a red arrow. Below the navigation bar, the breadcrumb 'IRB > Library' is shown. The main content area is titled 'Library' and contains a sub-navigation bar with tabs for Standard Operating Procedures, General, Worksheets, Checklists, and Templates. The 'Standard Operating Procedures' tab is highlighted with a red circle '1'. Below this, there is a table with two columns: 'Name' and 'Document'. The table contains two rows of data. A red circle '2' is placed over the 'General' tab, a red circle '3' over the 'Worksheets' tab, a red circle '4' over the 'Checklists' tab, and a red circle '5' over the 'Templates' tab. A red circle '6' is placed over the 'Export to CSV' button, which is located to the right of the table. At the bottom of the table, there is a pagination control showing '2 items', 'page 1 of 1', and '10 / page'.

1. **Standard Operating Procedures:** Guides.
2. **General:** Manuals provided by HRPP.
3. **Worksheets:** Determination worksheets for reference.
4. **Checklists:** HRPP Checklists.
5. **Templates:** HRPP templates.
6. **Export to CSV:** Export the Guides in CSV format (text format) to access.

IRB Workspace: Help Center

IRB > Help Center

Help Center

See the **1** below for **2** e guides and videos.

Guides **2** Videos

3 Export to CSV

Name	Description
IRB Researcher's Guide	A step-by-step guide for the study staff that includes creating and submitting a study, responding to clarification requests, and getting started with modifications, continuing reviews, and new information reports.
IRB Reviewer's Guide	A step-by-step guide for reviewers that includes finding review checklists, viewing the study details, and submitting review decisions.
IRB Staff Guide	A step-by-step guide for IRB staff that provides process overview and procedural information about IRB submissions.

- 1. Guides:** Step by step guides.
- 2. Videos:** Video for Single IRB Review for Multi-Site Studies.
- 3. Export to CSV:** Export the Guides in CSV format (text format) to access.