# IRB Navigation and Basic Tasks

When you first log in, you will be on on your Dashboard, which is the starting point for finding items and performing many basic tasks.

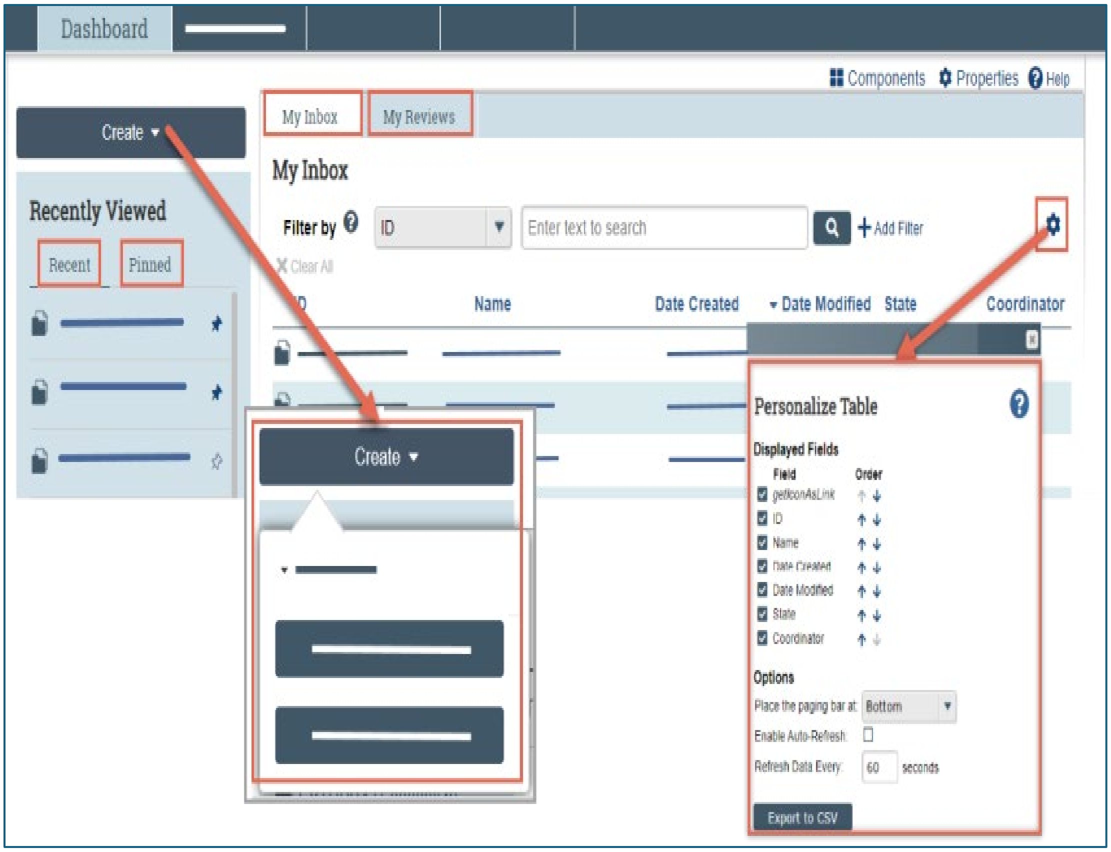
The dashboard is used to:

- Provide easy access to important and frequently used information.
- Help users identify time-sensitive tasks requiring action.
- Allow users to resume incomplete tasks quickly.
- Offer metrics and lists specific to each user's role.

**To find key items**

From your Dashboard, you will see:

- **Create Menu:** Located on the left, the Create drop-down menu lists creation options available to you.
- **My Inbox:** It displays all records you are associated with, even if no immediate action is required. It includes items that are still in progress, such as those in draft or pre-submission status, where you are listed in a relevant role. You can easily access these items to continue your work. The inbox also highlights records that require your attention, such as those needing review, approval, clarification responses, or other follow-up actions. The inbox includes records across all modules currently in WRAP, such as funding proposals, agreements, COI, and IRB. The **State** column shows where each item is in the workflow and provides context on what to do next.
- **My Reviews:** Items assigned to you to review. These are a subset of the items in My Inbox. This tab is particularly helpful for users who serve multiple roles (e.g., researcher and committee member) by isolating review-specific tasks. Like My Inbox, you can apply filters to narrow down the list further.
- **Create menu and buttons:** Actions you can perform. The menu will not show if you do not have access to any buttons.
- **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 the items in Recently Viewed section for quick and easy access. This is where those pinned items are listed.
- **Personalize Table:** You can alter the tables displayed on the dashboard by using the Personalize Table gear icon. The table can be filtered and sorted by clicking column headers to help you find what you need. Tables can often be exported as a **CSV file**, which can be opened and analyzed in spreadsheet programs such as Microsoft Excel.




- **Top Navigator:** Use this menu to move to other areas of WRAP IRB or WRAP integrated solutions.
- **Breadcrumb Trail:** Located just below the navigator, it shows your current page and lets you quickly return to previous pages.

**To identify what action is needed**

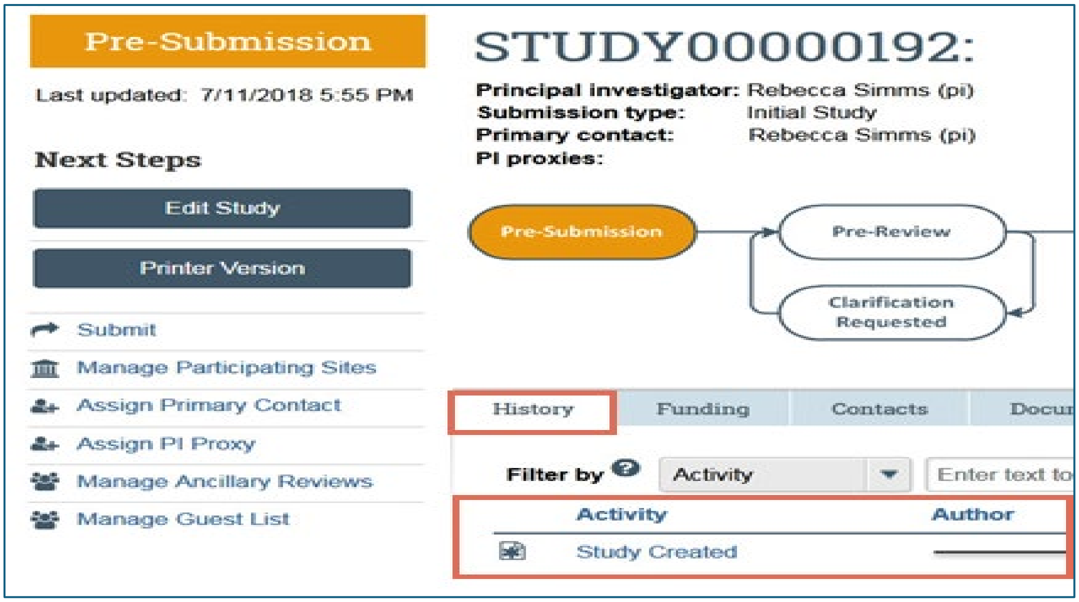
1. Review the state of submissions in My Inbox.
   The state gives a clue as to what to do next. For example, "Pre-Submission" means you haven't submitted the study. You can open it, and then finish and submit it for review.

To open a submission

1. From My Inbox, or from the Submissions page, click the submission name.
2. The submission workspace opens.

To view history

1. From the submission workspace, click the **History** tab.
2. The history tab lists the activity taken on a submission including any comments, attachments, or correspondence added.




**To find previous submissions**

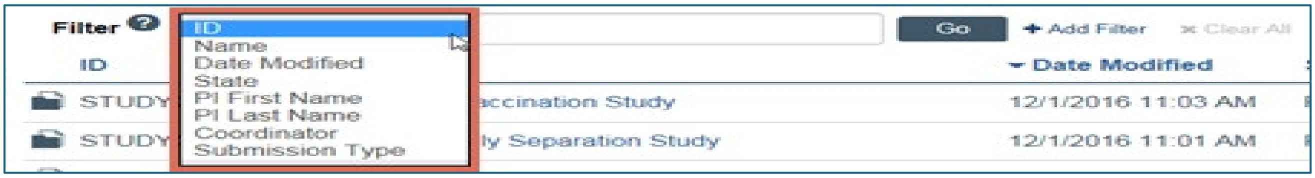
1. In the Top Navigator, click **IRB** and then **Submissions**.
2. Click the tab to see submissions you can access:
    - **In-Review:** Submissions undergoing IRB review.
    - **Active:** All approved submissions as well external IRB, non-human research, human research not engaged, lapsed, and suspended submissions.
    - **New Information Reports:** All Reportable New Information (RNI) submissions, in any state.
    - **External IRB:** All studies managed by an external IRB.
    - **Relying Sites:** All participating sites relying on the local IRB as the single IRB of record.

   Click the ellipsis to see:

    - **All Submissions:** All submissions, in any state.
    - **Archived:** All closed, disapproved, discarded, and terminated submissions.

**To filter data**

Many pages contain tables that you can filter to show specific data.




1. Select the column to filter by.
2. Type the beginning characters for the items you want to find. You can also type a % symbol as a wildcard before the characters. Examples:
    - 71 shows all items beginning with 71
    - %71 shows all items containing 71
3. Click Help for operators you can type in the text box.
4. Click **Go** to apply the filter.
5. To combine multiple filter criteria, click **Add Filter**.