Identifying Project Status in the Agreements Module in Insight

How-To Guide

Insight is Emory University's platform for managing research protocols and related administrative workflows. This guide provides step-by-step instructions for viewing the status of a project in the **Agreements** module, helping you monitor progress and identify steps in the review process.

View Project Status

1. From the menu on the left, click **Agreements**. *The Agreements module opens.*

   a. You can also navigate here by clicking **Agreements** on the Insight home page.

2. On the **Agreements** page, a list of studies displays in a table with details like **Study Name**, **Protocol Number**, **Principal Investigator (PI)** and **Overall Status**.

3. **Status** appears in a column on the right side of the screen, using blue, yellow and red indicators to provide a quick visual summary of each project's progress.

   a. **Blue** means the agreement has not yet been submitted. **Yellow** means the agreement has been submitted and is waiting for next steps. **Red** means the agreement has been sent back for modifications.

   b. Once the agreement is executed or awarded, the status indicators no longer appear in the table.

4. For more information on the status of a single agreement, navigate to the left side column and click on the **Agreement Number**. *The agreement page displays with a Transaction Status timeline.*

5. In the right of the screen, view **Workflow History** for more information about the agreement status.

Status Types

- Projects move through various statuses as they progress through Emory's review process. These statuses promote transparency and help researchers stay informed. Common statuses include:

   o **Pending**: Awaiting review or action

   o **Awarded**: Funding has been granted

   o **Closed**: Project is complete or terminated

   o **Hold**: Temporarily paused

   o **Transferred**: Moved to another department or PI

   o **Development**: In preparation or early stages

   o **Executed**: Finalized and active

Additional Resources

- Visit the [Project Insight SharePoint page](#) for additional training materials and project updates.