Addressing Activities for Review in Insight

How-To Guide

Insight is Emory University's platform for managing research protocols and related administrative workflows. This document explains how to address tasks listed under **Activities for Review** or **Action Required**. It walks you through identifying, reviewing and completing assigned tasks.

Access Insight

1. From the Insight Dashboard, view the **Agreements, Disclosures** and **Humans** modules.
    a. If you have any **Activities for Review** or **Actions Required**, you will see an orange banner in the box below each module labelled **Activities for Review**.
    b. If there are no tasks, you will see, "You do not currently have any activities for this module."
2. To open an individual task, click on its **Activity Number**. *The task page opens.*
3. To review all assigned tasks in a module, navigate to the menu on the left and click the **module name** (e.g., Agreements). *The module homepage opens.*
4. In the menu on the left, click **Action Required** beneath the module name. *A full list opens with all your assigned tasks for that module opens.*
5. Use the **search bar** at the top to filter by **PI Name**, **Agreement Number**, **Date** or **Status**. Click **Search**.
6. From the search results that appear, find the **task for review** and click its blue underlined **Action**. *The full Agreement Details page opens.*
7. On the Agreement Details page, review the **Transaction Status** and **Workflow History** for information about where the review process stands and what actions are required of you.
8. In the menu on the left, go to **Project Information** and click each **section name** to review its content.
9. If more information is needed, click **Comments** on the right side of the screen, enter your question and then click **Comment**. A *message is sent to the requester without moving the task forward.*
10. If changes are needed (i.e., you submitted a comment), select **Requires Modification** under **PI Actions** at the bottom right of the screen, then click **Sign Off**. *The task is sent back to the requester and removed from your review queue.*
    a. Once the requester makes edits and resubmits, the task will reappear in your **Activities for Review** and you will receive a notification.

11. If no changes are needed, select **Approve** and then click **Sign Off**. *The task is completed and the protocol moves forward in the review process.*

Additional Resources

- Visit the Project Insight SharePoint page for additional training materials and project updates.