# CLICK RESEARCH SOFTWARE

An Overview

Research and Economic Development





Tracie Groves
Training Programs Coordinator, RIS
<a href="mailto:traciegr@buffalo.edu">traciegr@buffalo.edu</a>
829-6650



## Some Background about Click



The Click Portal is a comprehensive software for managing research and streamlining workflow and compliance for research.



The Click Portal was implemented to assist principal investigators, students, compliance and research administration staff with administering sponsored programs



UB is leading the implementation of the Click Portal, working in collaboration with our vendor partner, Huron, and the PACS Leadership Team.

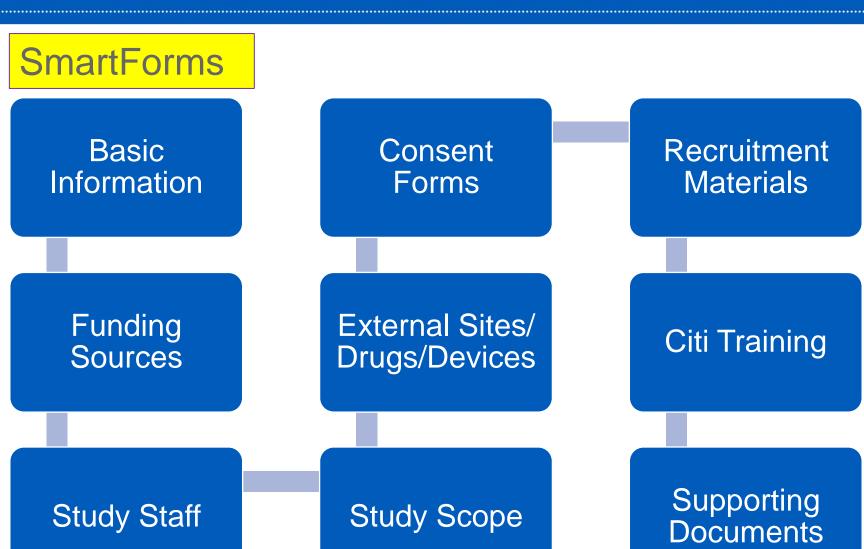
### The Click Portal

Click automates the submission, review, and approval processes while managing all major administrative aspects of the research and compliance lifecycle:



# New Study Entry

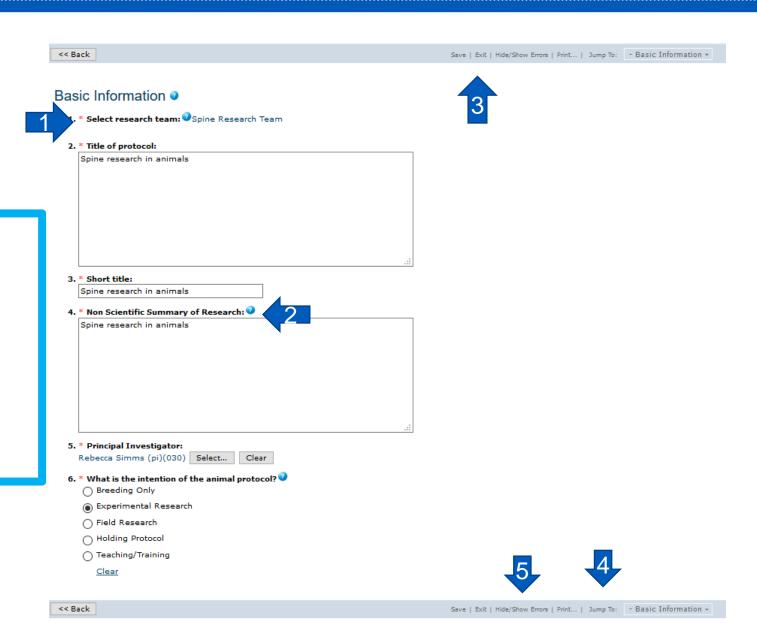
SmartForms are a series of forms where you input specific information about a study. Based on your responses, it will determine what form/ questions to complete next



## Smartform Basics

On the SmartForm pages, you will see:

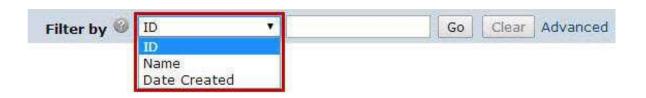
- 1. Required fields (red asterisk)
- 2. Field help
- 3. Navigation bar (save or exit)
- 4. Jump to other pages in protocol
- Ensure all required fields are completed



#### Filtering and Sorting Data

Many pages contain tables you can filter and sort to help you find the data you want.

- Filtering reduces the list to only the data that meets the criteria. The advanced filter lets you combine multiple filter criteria together.
- Sorting displays the data in ascending or descending order by a particular column.



NOTE: To combine multiple filter criteria, such as *ID* number, Name, and Date Created, use the Advanced Filters.

#### **Filtering Data**

- 1. Select the column to **Filter by** from the drop-down menu. The menu lists only the columns you can **Filter by**.
- 2. In the next box, type the beginning characters for the items you want to find. If you do not know the beginning characters, type a % symbol as a wildcard before the characters.

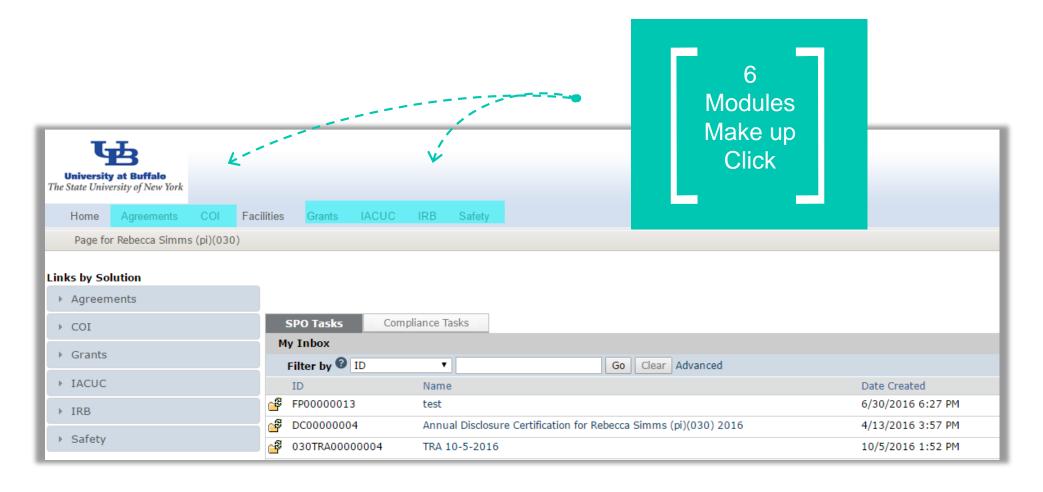


3. Click **Go** to apply the filter. The table shows only those rows that are an exact match. If you do not see the expected items in the list, click **Clear** in the **Filter by** area to remove the filter.



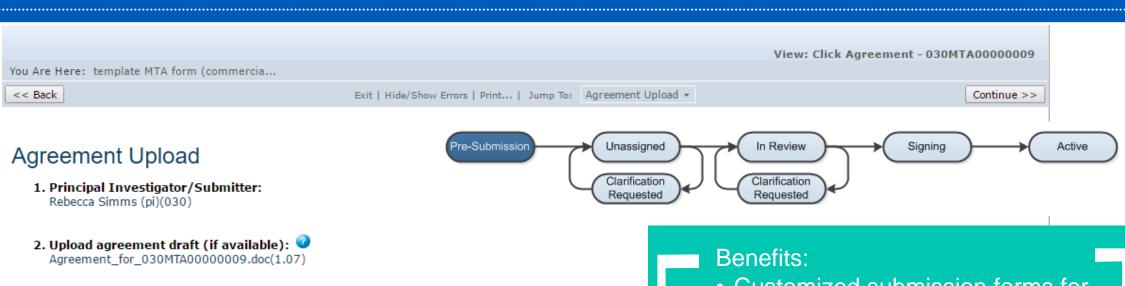
**NOTE:** For examples and a list of operators you can use, click the **Help** icon.

## The Click Portal Assists 6 Aspects of Research Management



## Agreements Module

- Provides electronic system for management of research-related contracts and agreements.
- Two offices at UB provide oversight for the agreements process:
  - ❖ The Office of Sponsored Projects Services (SPS) assists researchers to prepare and submit proposals for sponsored funding and provides management of awarded funds to ensure compliance with applicable regulations and policies.
  - ❖ The Office of Science, Technology Transfer, and Economic Outreach (STOR) negotiates and executes all Material Transfer Agreements (MTA) and Non-Disclosure Agreements (NDA) in keeping with the university's research guidelines and its obligations to federal research sponsors.



4. \* Agreement type:

Material Transfer Agreement (link to agreements definition)

If MTA, are the materials being provided/received with the present intention of preparing a joi Yes No

- 5. Purpose/Description of Agreement:

3. Title or internal reference number:

template MTA form (commercial entity).

6. Supporting documents:

Name

There are no items to display

- Customized submission forms for various agreement types
- Eliminates the risk of storing information in individual email accounts
- Interfaces with other modules simple tracking of relationships to studies and grant awards



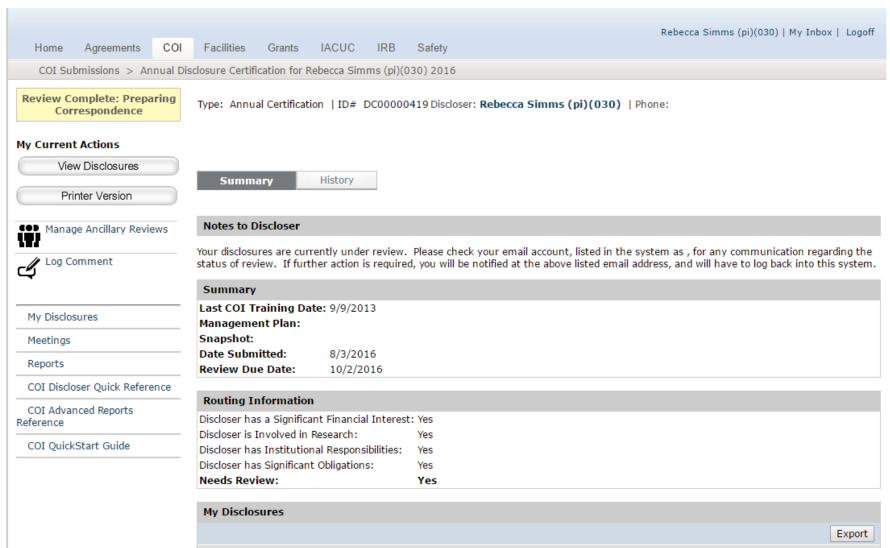
### COI Module

- Provides electronic system for management of research-related conflict of interest (COI) disclosures.
- Ensures the prevention of bias/ Helps avoid a circumstance in which a researcher's personal interest or relationships might compromise the integrity of research at the University
- The Compliance Team and Conflict of Interest Officer carefully review these disclosures, effectively manage any conflicts, and report to appropriate federal agencies as needed.
- Each Investigators must submit a Disclosure Statement that includes information pertaining to their significant financial interests (SFIs) and any sponsored travel that may be related to their research:
  - when submitting a grant application for research
  - prior to submitting human subject protocols for review
  - annually
  - immediately upon of discovering or acquiring a new SFI.



#### Benefits:

- Ensures consistent processes
- Eliminates redundant data input by connecting COI input to study protocols and awards
- Fosters a culture of transparency



### Click COI Module

The COI Module provides an electronic system for management of research-related conflict of interest disclosures. It ensures the prevention of bias and helps avoid a circumstance in which a researcher's personal interest or relationships might compromise the integrity of research at the University.

If you do not have a Click account, you can request access here: <a href="https://www.buffalo.edu/research/research-services/click-implementation.html">https://www.buffalo.edu/research/research-services/click-implementation.html</a>.

If you do not have access to your annual COI, you can request help here: <a href="https://www.buffalo.edu/research/about-us/staff-directory/ris/request-it-help.html">https://www.buffalo.edu/research/about-us/staff-directory/ris/request-it-help.html</a>

UB's annual filing deadline is Nov. 1.

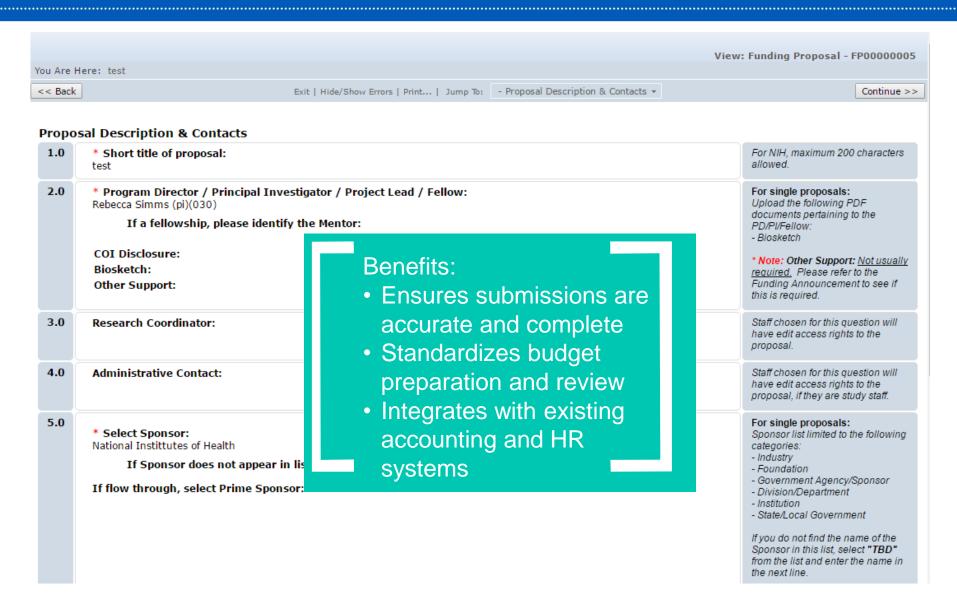
#### November

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### **Grants Module**

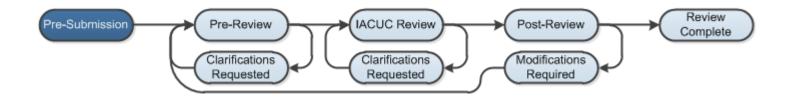
- Provides electronic system for the management of grant award applications, budgets, milestones, contract terms, sub-recipients, and compliance status.
- Ensures consistent processes and reminders to researchers and staff for pending work items
- Integrates grant processes with key compliance issues such as IRB and COI
- The Office of Sponsored Projects Services (SPS) helps develop grant proposals, reviews and submits sponsored funding proposals, and assists in managing grant awards.





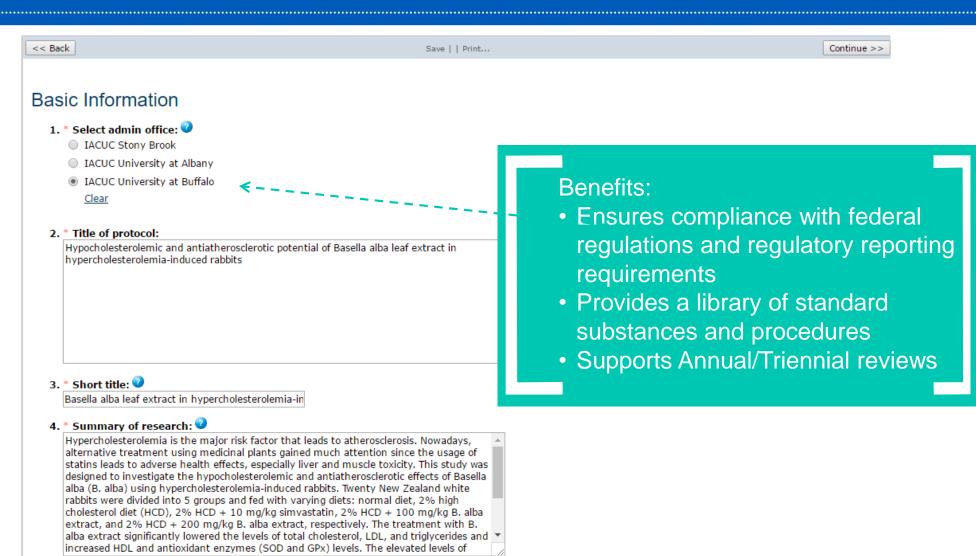
### IACUC Module

- Provides electronic system for management of the use of animal subjects in scientific and educational activities.
- Provides access to species, procedure, substance, training information and inspections
- Assists in the creation of reports
- The Institutional Animal Care and Use Committee (IACUC) reviews and approves all animal research to maintain nationally established standards to ensure that the University's research methods are ethical and compliant.



5. \* Principal Investigator:

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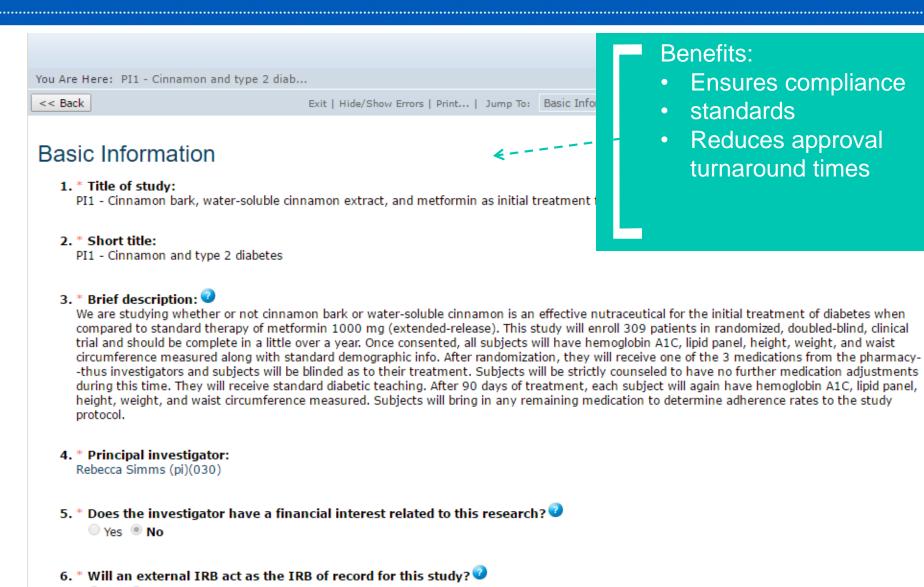


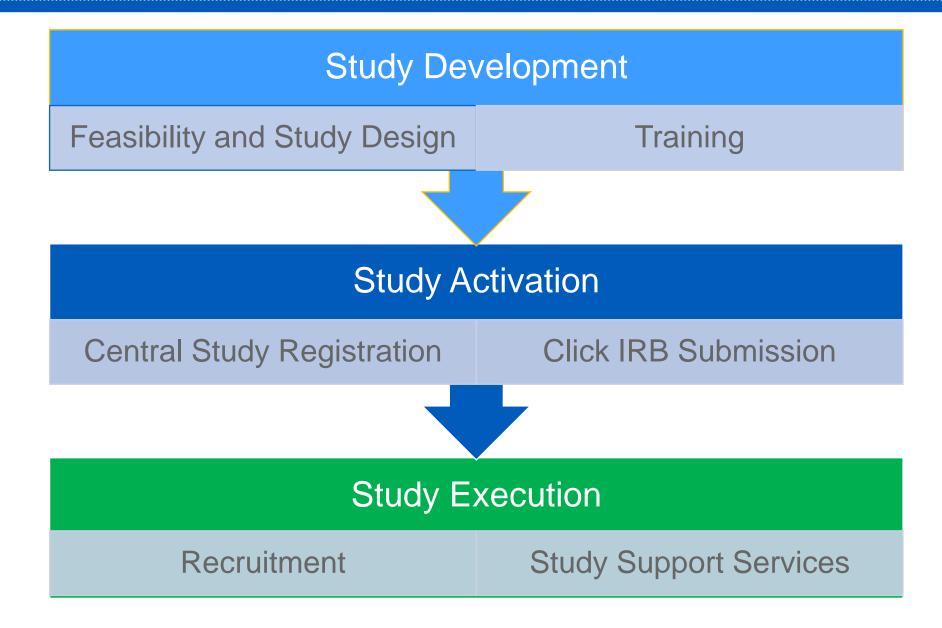


- Provides a streamlined way for researchers to create and submit protocols for studies involving human subjects.
- Initiates New Studies, Modifications/Continuing Reviews, and Reportable New Information
- The Institutional Review Board (IRB) approves, modifies, or rejects proposed research based on its perceived risks and benefits to prospective subjects.



Yes No





## **Central Study Registration CSR:**

This is the place to enter your study from any of the Health Sciences Schools, or if your study is deemed a clinical trial.

From the information you provide in CSR, the Clinical Research Office (CRO) will create your IRB submission in CLICK IRB.

It is important to note that CRO will never SUBMIT your study for you, they create it and then turn it over to you to add any outstanding documents that the IRB will need to review (data collection forms, surveys, consent forms and the like...) and submit the study for review when ready.

For help with CSR: contact Kim Brunton 716-888-4840, kbrunton@buffalo.edu

## Safety Module

- Provides way for researchers to identify any hazardous materials that will be part of an experimental protocol:
  - Biosafety Hazards
  - Radiation
  - Chemicals
  - Stem Cells
- The Environment, Health and Safety (EHS) department anticipates, recognizes, evaluates, and controls all safety hazards at the University while striving to protect human health and the environment.





#### **Basic Information**

- \* Select appropriate safety review: 
   Biosafety
- 2. \* Title of protocol: GLIOMA INITIATION BY HUMAN OLIGODENDROCYTE PROGENITORS
- 3. \* Short title: 
  GLIOMA INITIATION BY HUMAN OLIGODENDROCYTE PROGENITORS
- 4. \* Summary of research: Project Overview:

Glioblastoma multiforme (GBM), a lethal brain tumor, likely arises due to oncogenic mutations affecting key signaling pathways that regulate cell growth and prolifera determine which pathway mutations are necessary to induce glioma initiation and also the pathways that trigger specific subtypes of GBM. As oligodendrocyte progulargest population of dividing progenitors in the human brain, it is thought that these progenitors represent the most likely source of glioma initiating cell.

The first experiments in this project are designed to establish the timing of tumor initiation of primary human OPCs following the introduction of several oncogenic m over-expression. In order to model human glioma initiation, human OPCs will be transduced with dominant-negative or shRNAi that target four of the major oncogen PTEN, Rb, and EGFRVIII). The effects of these oncogenic mutations will be first established via a series of in vitro experiments. Then to better model whether these of generate bone fide GBM-like tumor, infected OPCs will be injected into immunocompromised mouse brain (i.e. an orthotopic xenograft model similar to Auvergne, Sim stereotaxic surgical techniques will be employed to implant 100,000 cells unilaterally into the lateral corpus collosum of 8-10 week old NOD.Cg-Prkdcscid Il2rgtm1Wjl various time points following injection to assess tumor formation in vivo.

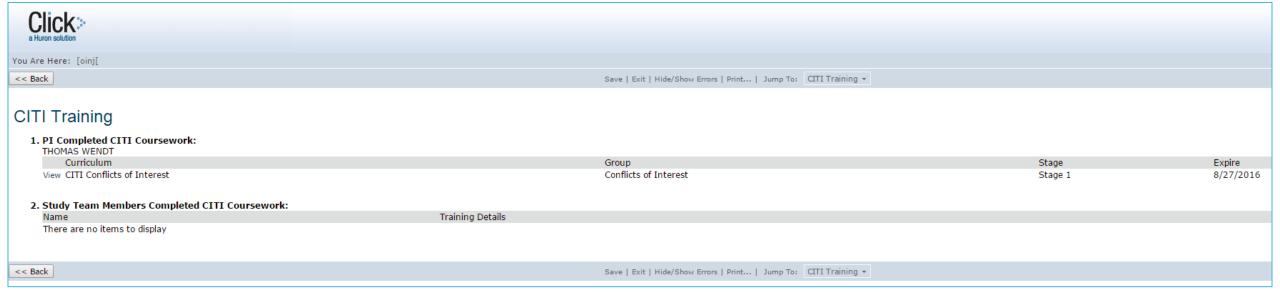
#### Benefits:

- Ensures adherence to NIH and other federal, state, and local regulations
- Allows the tracking of Safety protocols in parallel with IRB and IACUC protocols
- Contains full review, committee, and meeting management functionality



There **Click Portal** and **CITI** will automatically add course information for study team members.

In order to ensure that your protocol is not delayed, you should verify that all study personnel have completed the appropriate **CITI Training**.



To log in to Citi trainings, navigate to Navigate to <a href="http://www.citiprogram.org">http://www.citiprogram.org</a>, enter your UBIT name and Password.

## Getting a Click Account

Accounts are created for faculty and staff of the University at Buffalo for access to the Click Portal. Logging into the system will be done using their **UBIT Name** and **Password**.

Register for Click

UB students and non-UB staff who

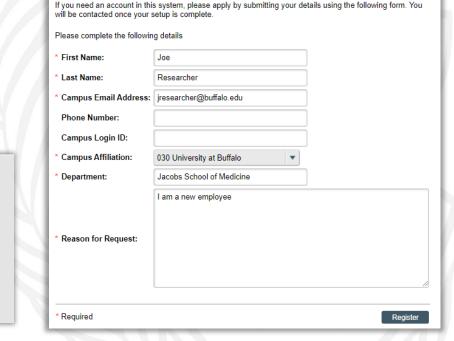
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register for an account

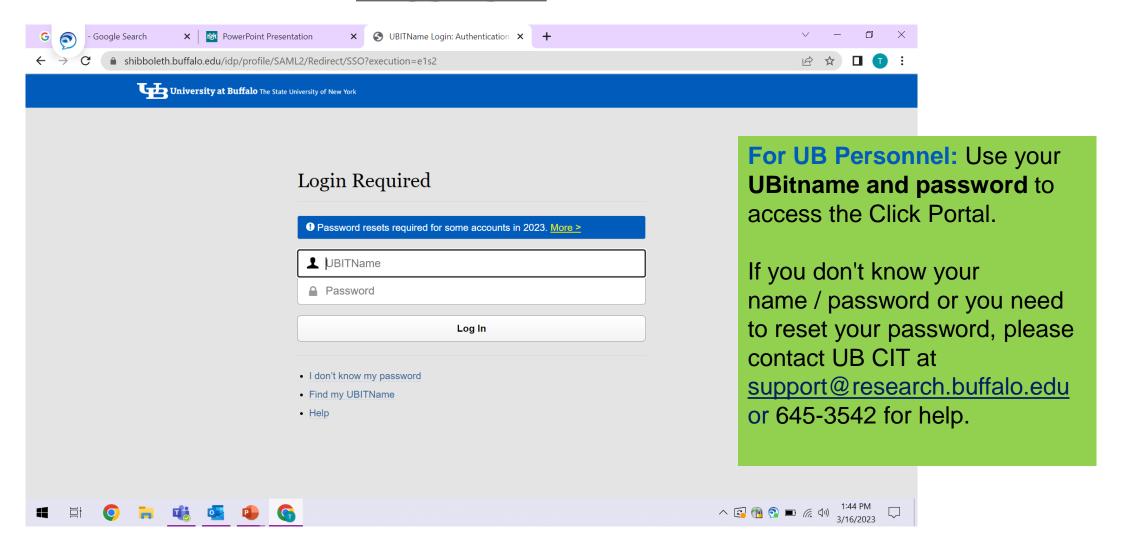
If your do not have an account, navigate to <a href="https://www.buffalo.edu/research/research-services/training.html">https://www.buffalo.edu/research/research-services/training.html</a>.

- 1. Locate the **Register for Click box** on the right side of the page
- 2. Complete the **Request Account** form
- 3. Click the **Register** button.
- 4. You will receive an email notification when your account has been activated.



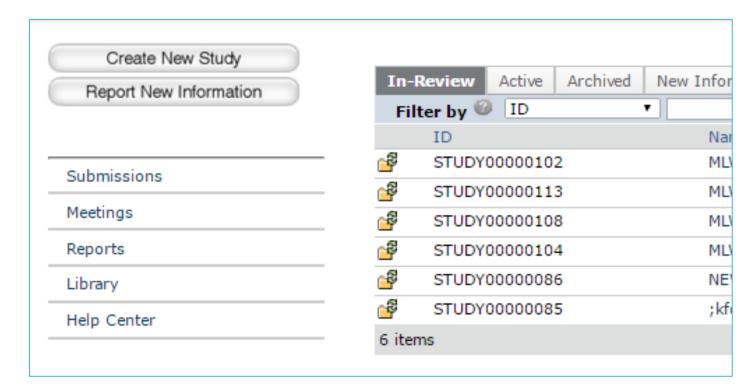
Request Account

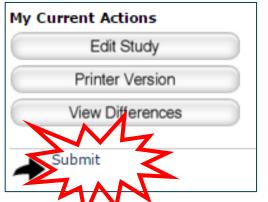
### **Logging In**



### **During PRE-Submission**

- 1. The research team will complete the SmartForm pages
- 2. The PI will then submit the study for review



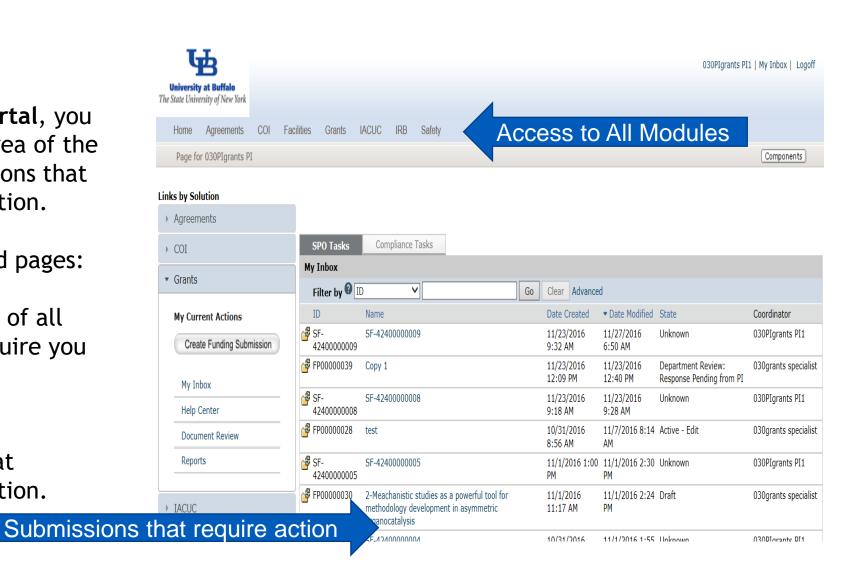


#### My Inbox

Each time you log into the **Click Portal**, you will be taken to your **Inbox**. This area of the portal contains a list of all submissions that currently require you to take an action.

My Inbox is divided into two tabbed pages:

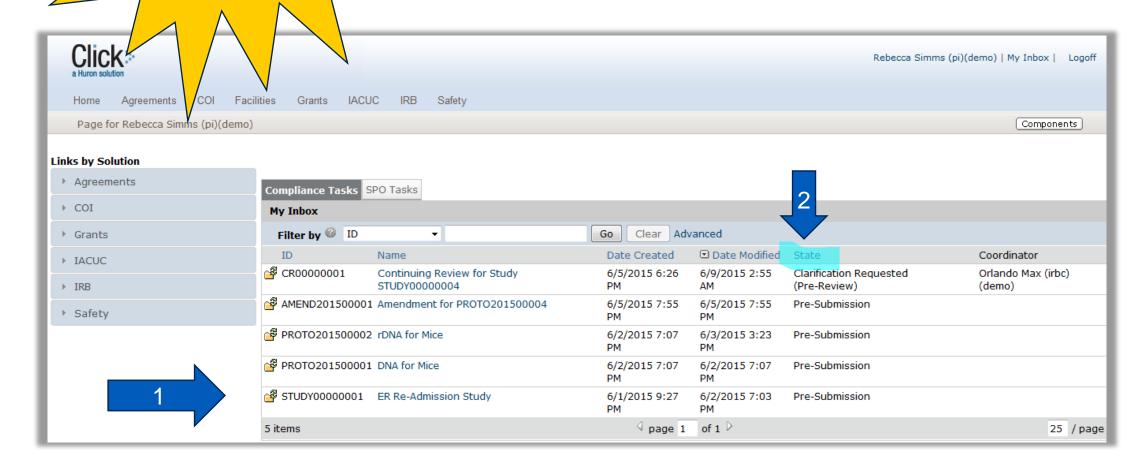
- Compliance Tasks -contains a list of all your submissions that currently require you to take an action.
- SPO Tasks -contains a list of your
   Agreements and COI Disclosures that
   currently require you to take an action.



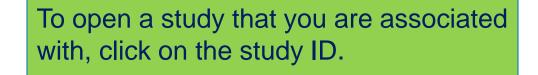
When you first log in to Click, you will be taken to the **Inbox** 

From My Inbox, you will see:

- 1. Submissions that require action
- 2. State in the review process



Safety



This will take you to the study workspace.

#### IDD

IRB

Create New Study						
Report New Information						
Submissions						
Meetings						
Reports						
Library						
Help Center						

Agreements

In-	Review Active Archived Ne	w Information Reports		
Fil	Iter by 🚳 ID	Go Clear Advanced		
	ID	Name	■ Date Modified	State
<b>≟</b> §	STUDY00000102	MLW Test Study	3/30/2016 3:00 AM	Pre-Review
<b>≟</b> ®	STUDY00000113	MLW Manual 3.28.16	3/29/2016 1:18 PM	Pre-Submission
<b>≟</b> ®	STUDY00000108	MLW Test Study 2.25.2016	2/25/2016 4:41 PM	Pre-Submission
<b>₽</b>	STUDY00000104	MLW Sample Study 2/18/2016	2/24/2016 4:00 PM	Pre-Review
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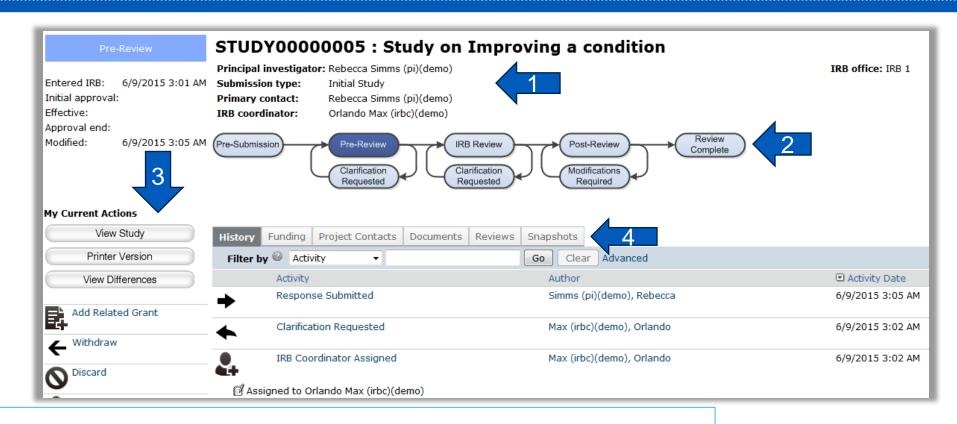
## Study Workspace

The Workspace displays key information about a particular study or submission.

# This is where anyone with access to the submission can find:

- Details regarding the study
- State in the review process
- Actions that can be taken in the current state
- Tabs with information regarding:
  - History
  - Attached documents
  - Important contacts
  - Submission information
  - Related projects

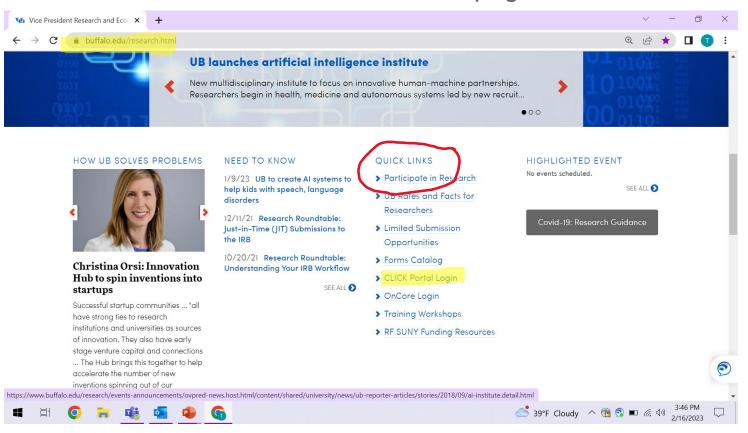




- 1. Study details
- 2. The state in the review process
- 3. Actions you can take
- 4. Tabs with information about the study and the review process

- 1. Navigate to <a href="http://www.buffalo.edu/research">http://www.buffalo.edu/research</a>
- Locate the QUICK LINKS section of the page:





- 3. Click on the Click Portal Login link
- 4. Enter your UBITName and Password and click the Log In button.

# Questions?

- For technical questions regarding Click:
  - Tracie Groves, traciegr@buffalo.edu
- For assistance with UBITNames and Passwords:
  - Electronic Research Administration, support@research.buffalo.edu

