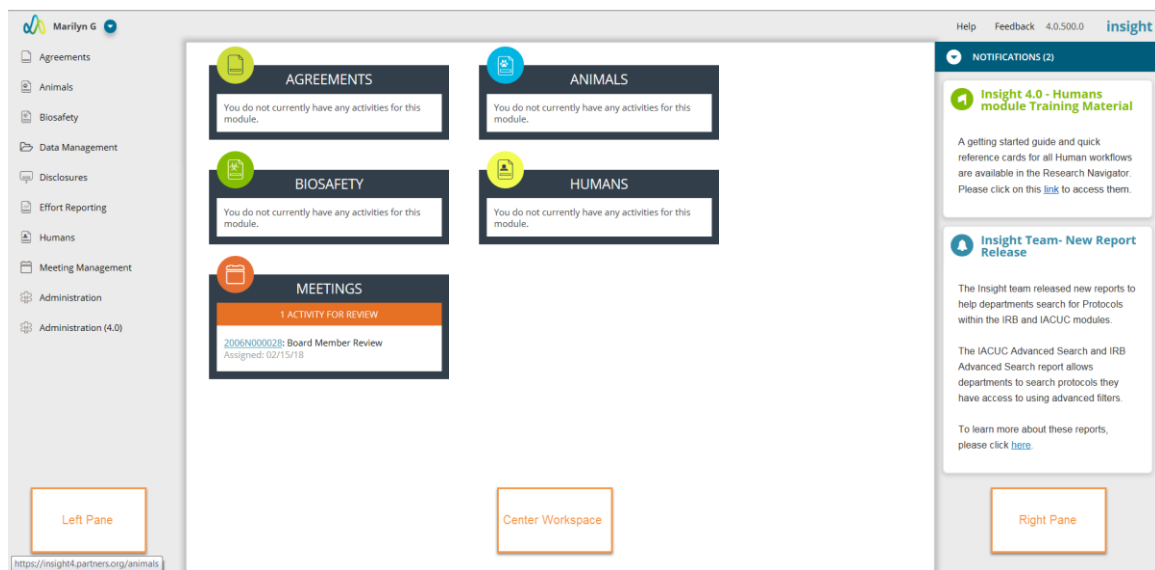


1. Open an internet browser session (*Insight is adapted to work in Edge, Chrome, and Safari*)
2. Enter the URL for Insight 4.0  
<https://insight4.partners.org/public/publichome.aspx>
3. Enter your Partners UserName and Password then click **Sign In**
4. Click **Send code** and enter the six-digit code sent to your mobile device

*If you are logged into the MGB network or through VPN you will not be prompted to enter a six-digit code.*

5. Your Dashboard will display similar to that shown in the image below



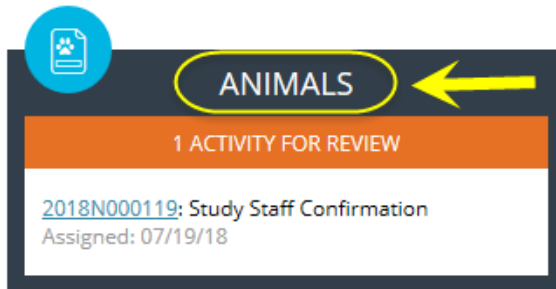
### Exploring the Dashboard

1. The **Dashboard** is the main landing page in Insight 4.0. It is divided into three areas – Center Workspace, Left Pane and Right Pane.
2. The **Center Workspace** is your primary work area. On the Dashboard, it displays a card for each Insight module you have access to. The card will display up to five activities within the module that require your review. Each activity has a link that, when clicked, navigates the user to the specific activity. Or you can access the associated module, by clicking the title hyperlink at the top of the card.
3. The **Left Pane** is the navigation pane. On the Dashboard, it provides you with an additional way of accessing the various modules. Once in a module, the Left Pane provides quick access to activities, notifications and allowable actions, such as creating a protocol or a process, such as an Amendment, or Renewal.

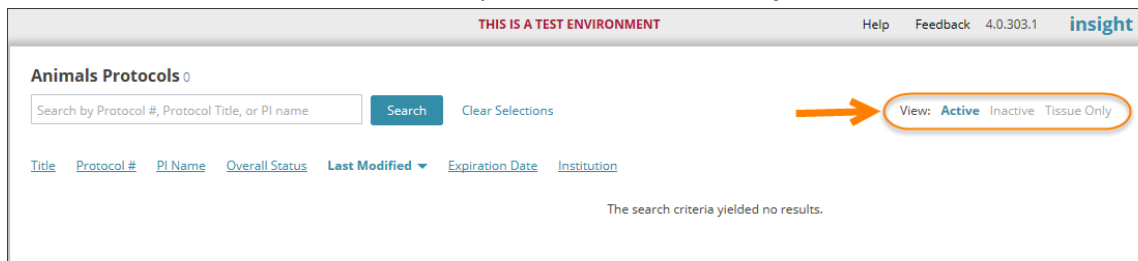
- The **Right Pane** is the information pane. On the Dashboard, it displays notifications being pushed out by system administrators to users. Mostly the Right Pane becomes heavily populated when at the protocol level.

Displaying Protocols

- To display your protocols, click on the hyperlink at the top of the card in the **Center Workspace** of the **Dashboard**.



- The **Left Pane** expands to provide access to activities, notifications and allowable actions within the chosen module. A search box will open in the **Center Workspace**.



- The default view is “Active,” which displays all approved, pending, and draft submissions you have access to. If you can access several records, Insight may require you to click the [Search] key before displaying records. It is preferable to enter search criteria before searching. No results will display until a search is performed. This rule applies to users who have been granted access to data through the Insight Admin module with the following conditions:

**NOTE:** Insight 3.6.4 displayed separate tabs for *Active Protocols*, *Pending Applications*, and *Work in Progress*. In Insight 4.0, these submissions will all display under one tab – the Active tab, which presents by default on the Animals module landing page.

- User has access to more than five Principal Investigator’s portfolios OR
- User has access to more than one Organization

Search results can be filtered by protocol number, protocol title or Principal Investigator name.

- Click “Inactive” to display all inactive submissions you have access to.
- Click “Tissue Only” to display all tissue submissions you have access to.

If you have questions about using Insight 4.0, please contact the PHS Insight Helpdesk ([InsightTickets@partners.org](mailto:InsightTickets@partners.org), 857-282-1959.) For questions about completing an Animals protocol or related transaction in Insight 4.0, please contact the MGH IACUC Office ([IACUC@mg.harvard.edu](mailto:IACUC@mg.harvard.edu)). Thank you!