



AUBURN UNIVERSITY  
Office of the Senior Vice President  
Research and Economic Development

# ENDEAVOR

/// AUBURN UNIVERSITY

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2-19-2024

AUSPAN

MARTHA TAYLOR



# Status Update

Onboarding of the COI module began June 5 **GO LIVE 1-16-2024**

Onboarding of the IRB module began August 21 - GO LIVE MAY 31, 2024

Onboarding of Grants and Agreements began October 30 – GO LIVE January 10, 2025

Replacing IBC with IACUC and Animal Ops in the timeline

Working closely with SMEs

Continue to present to and engage project champions

Training sessions for users through HRD and other methods

Continue to implement communication plan including presentations to various leadership groups

Updating Websites – working on a new one for Endeavor



# https://endeavor.auburn.edu

COI launched 1-16-2024 with resources available here:  
<https://auburn.edu/administration/oacp/conflictinterest.php>

The screenshot shows the ENDEAVOR web application interface. The top navigation bar includes the ENDEAVOR logo and the user name "Hello, Martha Taylor". Below this is a main navigation menu with "Dashboard", "Admin", "COI", and "Settings". The "COI" section is active, showing sub-tabs for "My Inbox", "My Reviews", and "COI Dashboard". The "My Inbox" tab is selected, displaying a search bar and a table of disclosure profiles. The table has columns for ID, Name, Date Created, Date Modified, State, and Coordinator. One item is listed: ID DP00000005, Name Disclosure Profile for Martha Taylor, Date Created 1/8/2024 2:29 PM, Date Modified 1/9/2024 8:27 AM, State Action Required, and Coordinator Martha Taylor. The page shows 1 item and is on page 1 of 1, with 25 items per page.

ENDEAVOR  
AUBURN UNIVERSITY

Hello, Martha Taylor

Dashboard Admin COI Settings

Page for Martha Taylor

Components Properties Help

My Inbox My Reviews COI Dashboard

My Inbox

Filter by ID Enter text to search + Add Filter X Clear All

ID	Name	Date Created	Date Modified	State	Coordinator
DP00000005	Disclosure Profile for Martha Taylor	1/8/2024 2:29 PM	1/9/2024 8:27 AM	Action Required	Martha Taylor

1 items

page 1 of 1

25 / page

Create ▾

Recently Viewed

Recent Pinned

-  STUDY0000018: RC Test 2.8A ☆
-  FP0000028: AA - TestPosal ☆
-  FP0000022: NIFA Proposa... - SQN1.16.24 ☆
-  STUDY0000014: RC 1.26.2024 ☆
-  AWD0000006: How did I get here? - DM ☆
-  FP0000017: How did I get here? - DM ☆
-  DP0000004: Disclosure P...a Simms (pi) ☆

My Inbox

My Reviews

My Inbox

Filter by ⓘ

ID ▾



+ Add Filter

✕ Clear All



ID	Name	Date Created	Date Modified	State	Coordinator
DP00000004	Disclosure Profile for Rebecca Simms (pi)	10/16/2023 11:01 AM	2/9/2024 1:53 PM	Action Required	Rebecca Simms (pi)
FP00000028	AA - TestPosal	2/2/2024 9:35 PM	2/2/2024 9:37 PM	Draft	Ava Lambert
STUDY00000014	RC 1.26.2024	1/26/2024 4:34 PM	1/26/2024 5:10 PM	Pre-Submission	
STUDY00000001	new study	10/16/2023 9:07 AM	1/19/2024 1:01 PM	Approved	Orlando Max (irbc)
FP00000023	ARS Proposal Approval Workflow- SQN1.16.24	1/16/2024 3:03 PM	1/16/2024 3:03 PM	Draft	Ava Lambert
FP00000022	NIFA Proposal Approval Workflow- SQN1.16.24	1/16/2024 3:01 PM	1/16/2024 3:03 PM	Draft	Ava Lambert
STUDY00000010	Smartform testing 1 8 24	1/8/2024 2:29 PM	1/8/2024 2:29 PM	Pre-Submission	
STUDY00000009	Smartform testing 1 4 24	1/4/2024 10:01 AM	1/5/2024 9:13 AM	Pre-Submission	
PAR00000025	test	12/15/2023 1:58 PM	12/15/2023 2:11 PM	Pre-Submission	
NDA00000003	Agreement for: How did I get here? - DM	12/11/2023 9:30 PM	12/12/2023 10:10 AM	Pre-Submission	
NDA00000005	ORBIX	12/12/2023 9:57 AM	12/12/2023 10:00 AM	Pre-Submission	
DSP00000002AM1	Amendment for AU-234 1	12/11/2023 8:12 PM	12/11/2023 8:12 PM	Pre-Submission	
FP00000021	MH Sustainable Agroecosystem Scenarios	12/11/2023 12:37 PM	12/11/2023 1:58 PM	Department Review	Ava Lambert
MTA00000001	Test MTA - 12/7/2023	12/7/2023 2:06 PM	12/7/2023 2:11 PM	Pre-Submission	
NDA00000002	Test NDA - 12/7/2023	12/7/2023 1:54 PM	12/7/2023 2:03 PM	Pre-Submission	
FP00000020	Important Research	12/5/2023 3:54 PM	12/6/2023 8:56 AM	Draft	Ava Lambert
FP00000019	11302023 KLT Research that CANDI	11/30/2023 11:16 AM	12/1/2023 10:03 AM	Draft	Ava Lambert
FP00000018	Test Project 11/30/23 Day	11/30/2023 10:02 AM	11/30/2023 10:46 AM	Draft	Ava Lambert

Action Required

Disclosure profile last completed: 12/19/2023

Request Pre-Approval

Complete Disclosure Profile Update

## Disclosure Profile for Rebecca Simms (pi)

Instruction Center

**Action Required**

Review disclosure information in the disclosure profile. When all disclosure information is current and accurate, click on the **Complete Disclosure Profile Update** button.

**Reason**

Discloser manually updated the disclosure profile

Edit Disclosure Profile

Disclosures	Pre-Approval Requests	Training	History					
Entity	Foreign Entity?	Publicly Traded?	Relation to Discloser	Disclosure Types	Total Value	Total Time Commitment (Days)	Last Modified	
<a href="#">view</a> Iranian Company	Yes	No	Self	Foreign Interests	\$0.00	N/A	1/23/2024	
<a href="#">view</a> North Korean Company	Yes	No	Self	Foreign Interests	\$0.00	N/A	1/23/2024	
<a href="#">view</a> Russian Company	Yes	No	Self	Foreign Interests	\$0.00	N/A	12/19/2023	
<a href="#">view</a> Acme International			Self	Outside Employment or Activity	\$12,000.00	N/A	1/23/2024	
<a href="#">view</a> AVP, Administrative Effectiveness			Self	Foreign Interests	\$0.00	N/A	12/15/2023	

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-  STUDY0000014: RC 1.26.2024 ☆
-  AWD0000006: How did I get here? - DM ☆
-  FP0000017: How did I get here? - DM ☆
-  DP0000004: Disclosure P...a Simms (pi) ☆

My Inbox

My Reviews

My Inbox

Filter by ⓘ

ID ▾

Enter text to search



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FP0000018	Test Project 11/30/23 Day	11/30/2023 10:02 AM	11/30/2023 10:46 AM	Draft	Ava Lambert

Grants > AA - TestPosal

Help

**Draft**

# AA - TestPosal

FP00000028

Funding Proposal

**Next Steps**

- Edit Funding Proposal
- Printer Version

- COI Disclosure Status
- Submit For Department Review
- Certify
- Withdraw Proposal
- Send to COI
- Manage Ancillary Reviews
- Manage Relationships
- Manage Tags
- Create Agreement
- Add Attachments
- Copy
- Create Additional Budget
- Export Budget
- Send Email
- Manage Access
- Add Comment

**Proposal Information**

PD/PI:	Rebecca Simms (pi)
Department:	Biochemistry
Specialist:	Ava Lambert
Sponsors:	GREEN FIELDS UNIVERSITY
Internal Submission Deadline:	2/20/2024
Certified:	No

**Budget Information**

Starting Date:	2/29/2024
Number of Periods:	5
Total Direct:	\$0
Total Indirect:	\$0
Total:	\$0

SF424 Link:



Budgets	SF424 Summary	History	Reviewers	Attachments	Financials	Reviewer Notes	Related Projects	Change Log
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**Working Budgets**

Name	SmartForm	Date Modified	State	Funding Source	Total	In Financials?
GREEN FIELDS UNIVERSITY	[Edit]	2/2/2024 9:35 PM	Draft	Institution (Internal)	\$0	yes

1 items

page 1 of 1

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Create ▾

Recently Viewed

Recent Pinned

- STUDY0000018: RC Test 2.8A
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IRB > RC 1.26.2024

Help

**Pre-Submission**

Last updated: 1/26/2024 6:10 PM

**Next Steps**

Edit Study

Printer Version

- Submit
- Assign Primary Contact
- Manage Ancillary Reviews
- Manage Guest List
- Add Related Grant
- Add Comment
- Copy Submission
- Discard

# STUDY00000014: RC 1.26.2024

**Principal investigator:** Rebecca Simms (pi)  
**Submission type:** Initial Study  
**Primary contact:** Rebecca Simms (pi)  
**PI proxies:**

**IRB office:** IRB 1  
**IRB coordinator:**



History	Funding	Contacts	COI	Documents	Reviews	Snapshots	Training
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Filter by ? Activity ▼  🔍 + Add Filter ✕ Clear All ⚙️

Activity	Author	Activity Date
Study Created	Simms (pi), Rebecca	1/26/2024 5:34 PM

Create ▾

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Recent Pinned

- STUDY0000018: RC Test 2.8A
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FP0000018	Test Project 11/30/23	11/30/2023 10:02 AM	11/30/2023 10:46 AM	Draft	Ava Lambert

Approved

# PAR00000001: Consulting for Abbott

**Date created:**  
10/17/2023 11:11 AM  
**Date submitted:**  
10/17/2023  
**Last review date:**  
10/31/2023

**Request type:** Consulting Activity and other Professional Services  
**Assigned reviewer:** Serafina Arkadin (safa2)

**Discloser:** Rebecca Simms (pi)  
**Discloser's employer:** GREEN FIELDS UNIVERSITY  
**Determination:** Approved  
**Determination date:** 10/31/2023  
**Completed:** No

### Next Steps

View Pre-Approval Request

Add Comment

Copy Request



History		Review Information	
Activity	Author	Activity Date	
Pre-Approval Request Submitted	Simms (pi), Rebecca	10/17/2023 11:12 AM	

Create ▾

Recently Viewed

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NDA00000003

Pre-Submission

# Agreement for: How did I get here? - DM

Primary contact: Ava Lambert  
 Manager/PI: Rebecca Simms (pi)  
 Owner:  
 Created: 12/11/2023 9:30 PM  
 Received:  
 Modified: 12/12/2023 10:10 AM  
 Effective:  
 Expires:

**Agreement:**  
**Final agreement:**  
**Contracting party:** 100+ Women Strong

**Agreement type:** Non-Disclosure Agreement  
**Office:** Office of Sponsored Programs  
**Responsible Department/Division/Institute:** Biochemistry  
**Description:** Testing



### Next Steps

Edit Agreement

Printer Version

View All Correspondence

- Submit
- Manage Ancillary Reviews
- Manage Access
- Assign PI Proxies
- Discard
- Copy Agreement
- Manage Relationships
- Manage Tags

- Correspondence
- History
- Ancillary Reviews
- Contacts
- Snapshots
- Related Projects
- Documents

### Correspondence To Do

Filter by ? Due Date ▼ Enter text to search 🔍 + Add Filter ✕ Clear All ⚙️

Due Date	Owner	Type	Status	For Person	Summary	Date Modified
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No data to display.

### Correspondence Completed

Filter by ? Due Date ▼ Enter text to search 🔍 + Add Filter ✕ Clear All ⚙️

Due Date	Owner	Type	Status	For Person	Summary	Date Modified
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No data to display.

Create ▾

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NDA0000002	Test NDA - 12/7/2023	12/7/2023 1:54 PM	12/7/2023 2:03 PM	Pre-Submission	
FP0000020	Important Research	12/5/2023 3:54 PM	12/6/2023 8:56 AM	Draft	Ava Lambert
FP0000019	11302023 KLT Research that CANDI	11/30/2023 11:16 AM	12/1/2023 10:03 AM	Draft	Ava Lambert
FP0000018	Test Project 11/30/23 Day	11/30/2023 10:02 AM	11/30/2023 10:46 AM	Draft	Ava Lambert

DSP00000002AM1

Pre-Submission

# Amendment for AU-234 1

Primary contact: Anthony Ventimiglia  
 Manager/PI: Rebecca Simms (pi)  
 Owner:  
 Created: 12/11/2023 8:12 PM  
 Received:  
 Modified: 12/11/2023 8:12 PM  
 Effective:  
 Expires:

**Agreement:**  
**Final agreement:**  
**Contracting party:** Coneva

**Agreement type:** Data Sharing Plans  
**Office:** Office of Sponsored Programs  
**Responsible Department/Division/Institute:** GREEN FIELDS UNIVERSITY  
**Description:** Research and Data Sharing Agreement  
**Amendment description:** No cost extension



Next Steps

- Edit Amendment
- Printer Version
- View All Correspondence

- Submit
- Manage Ancillary Reviews
- Assign PI Proxies
- Discard
- Manage Tags

Correspondence	History	Ancillary Reviews	Contacts	Snapshots
Filter by <span>?</span> Activity <span>▼</span> <input type="text" value="Enter text to search"/> <span>🔍</span> <span>+</span> Add Filter <span>✕</span> Clear All <span>⚙️</span>				
Activity	Author	▼ Activity Date		
🔄 Changes Made	Simms (pi), Rebecca	12/11/2023 8:12 PM		
🔄 Changes Made	Simms (pi), Rebecca	12/11/2023 8:12 PM		
📄 Created	Simms (pi), Rebecca	12/11/2023 8:12 PM		
➕ Minor Version Incremented	Simms (pi), Rebecca	12/11/2023 8:12 PM		

Create ▾

Recently Viewed

Recent Pinned

- STUDY0000018: RC Test 2.8A ☆
- FP0000028: AA - TestPosal ☆
- FP0000022: NIFA Proposa... - SQN1.16.24 ☆
- STUDY0000014: RC 1.26.2024 ☆
- AWD0000006: How did I get here? - DM ☆
- FP0000017: How did I get here? - DM ☆
- DP0000004: Disclosure P...a Simms (pi) ☆

My Inbox

My Reviews

My Inbox

Filter by ⓘ

ID ▾

Enter text to search



+ Add Filter

✕ Clear All



ID	Name	Date Created	Date Modified	State	Coordinator
DP0000004	Disclosure Profile for Rebecca Simms (pi)	10/16/2023 11:01 AM	2/9/2024 1:53 PM	Action Required	Rebecca Simms (pi)
FP0000028	AA - TestPosal	2/2/2024 9:35 PM	2/2/2024 9:37 PM	Draft	Ava Lambert
STUDY0000014	RC 1.26.2024	1/26/2024 4:34 PM	1/26/2024 5:10 PM	Pre-Submission	
STUDY0000001	new study	10/16/2023 9:07 AM	1/19/2024 1:01 PM	Approved	Orlando Max (irbc)
FP0000023	ARS Proposal Approval Workflow- SQN1.16.24	1/16/2024 3:03 PM	1/16/2024 3:03 PM	Draft	Ava Lambert
FP0000022	NIFA Proposal Approval Workflow- SQN1.16.24	1/16/2024 3:01 PM	1/16/2024 3:03 PM	Draft	Ava Lambert
STUDY0000010	Smartform testing 1 8 24	1/8/2024 2:29 PM	1/8/2024 2:29 PM	Pre-Submission	
STUDY0000009	Smartform testing 1 4 24	1/4/2024 10:01 AM	1/5/2024 9:13 AM	Pre-Submission	
PAR0000025	test	12/15/2023 1:58 PM	12/15/2023 2:11 PM	Pre-Submission	
NDA0000003	Agreement for: How did I get here? - DM	12/11/2023 9:30 PM	12/12/2023 10:10 AM	Pre-Submission	
NDA0000005	ORBIX	12/12/2023 9:57 AM	12/12/2023 10:00 AM	Pre-Submission	
DSP0000002AM1	Amendment for AU 234 1	12/11/2023 8:12 PM	12/11/2023 8:12 PM	Pre-Submission	
FP0000021	MH Sustainable Agroecosystem Scenarios	12/11/2023 12:37 PM	12/11/2023 1:58 PM	Department Review	Ava Lambert
MTA0000001	Test MTA - 12/7/2023	12/7/2023 2:06 PM	12/7/2023 2:11 PM	Pre-Submission	
NDA0000002	Test NDA - 12/7/2023	12/7/2023 1:54 PM	12/7/2023 2:03 PM	Pre-Submission	
FP0000020	Important Research	12/5/2023 3:54 PM	12/6/2023 8:56 AM	Draft	Ava Lambert
FP0000019	11302023 KLT Research that CANDI	11/30/2023 11:16 AM	12/1/2023 10:03 AM	Draft	Ava Lambert
FP0000018	Test Project 11/30/23 Day	11/30/2023 10:02 AM	11/30/2023 10:46 AM	Draft	Ava Lambert

**Pre-Submission**

MTA00000001

# Test MTA - 12/7/2023

Primary contact: Juan Alvarez  
 Manager/PI: Rebecca Simms (pi)  
 Owner:  
 Created: 12/7/2023 2:06 PM  
 Received:  
 Modified: 12/7/2023 2:11 PM  
 Effective:  
 Expires:

**Agreement:** Test.docx(0.01) ...  
**Final agreement:**  
**Contracting party:** ZOW Pharmaceuticals

**Agreement type:** Material Transfer Agreement  
**Office:** Office of Sponsored Programs  
**Responsible Department/Division/Institute:** Biochemistry  
**Description:**



**Next Steps**

Edit Agreement

Printer Version

View All Correspondence

- Submit
- Manage Ancillary Reviews
- Manage Access
- Assign PI Proxies
- Discard
- Copy Agreement
- Manage Relationships
- Manage Tags

Correspondence	History	Ancillary Reviews	Contacts	Snapshots	Related Projects	Documents
Filter by <span>?</span> Activity <span>▼</span> <input type="text" value="Enter text to search"/> <span>🔍</span> <span>+</span> Add Filter <span>✕</span> Clear All <span>⚙️</span>						
Activity	Author	▼ Activity Date				
Changes Made	Administrator, System	12/7/2023 2:11 PM				
Changes Made	Administrator, System	12/7/2023 2:11 PM				
Changes Made	Administrator, System	12/7/2023 2:10 PM				
Changes Made	Administrator, System	12/7/2023 2:09 PM				
Changes Made	Administrator, System	12/7/2023 2:09 PM				
Changes Made	Administrator, System	12/7/2023 2:08 PM				
Changes Made	Administrator, System	12/7/2023 2:07 PM				
Changes Made	Administrator, System	12/7/2023 2:07 PM				
Created	Administrator, System	12/7/2023 2:06 PM				



*HELP ME!*

COI > Help Center

## Help Center

Guides

Videos

Export to  
CSV

Name	Description
<a href="#">COI Administrator's Guide</a>	A guide for administrators or staff that includes steps for managing certifications, ancillary reviews, central actions, and retrospective reviews or mitigation plans.
<a href="#">COI Reviewer's Guide</a>	A guide for reviewers that includes steps for reviewing a certification or pre-approval request and managing a management plan.
<a href="#">Meeting Management Guide</a>	A step-by-step guide for COI Administrators and committee participants that includes checklists for preparing and running committee meetings, as well as recording decisions.
<a href="#">COI Discloser's Guide</a>	A guide for disclosers that includes steps for updating a disclosure profile, submitting a pre-approval request, and reviewing and accepting plans.

4 items

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1



2



3



4



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# Huron COI Discloser's Guide

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March 2023

IRB > Help Center

## Help Center

See the links below for printable guides and videos.

Guides

Videos

Export to CSV



**Name**

**Description**

IRB Advanced Reports Guide

A step-by-step guide explaining how to navigate and interpret advanced reports.

IRB Multi-Site Study Guide

A step-by-step guide for all users working with multi-site studies reviewed by a single IRB of record.

IRB Researcher's Guide

A step-by-step guide for the study staff that includes creating and submitting a study, responding to clarification requests, and getting started with modifications, continuing reviews, and new information reports.

IRB Reviewer's Guide

A step-by-step guide for reviewers that includes finding review checklists, viewing the study details, and submitting review decisions.

IRB Staff Guide

A step-by-step guide for IRB staff that provides process overview and procedural information about IRB submissions.

Meeting Management Guide

A step-by-step guide for IRB staff and committee participants that includes checklists for preparing for and running committee meetings, as well as recording decisions.

6 items

◀ page 1 of 1 ▶

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IRB > Library

# Library

- Standard Operating Procedures
- General
- Worksheets
- Checklists
- Templates

Export to CSV

Name	Document
HRP-090 - SOP - Informed Consent Process for Research	HRP-090 - SOP - Informed Consent Process for Research
HRP-091 - SOP - Written Documentation of Consent	HRP-091 - SOP - Written Documentation of Consent

2 items

◀ page 1 of 1 ▶

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Grants > Help Center

## Help Center

Guides

Videos

Name	Description
Grants Researcher's Guide	Concise instructions for key tasks in preparing applications for sponsored funding using the Grants solution.
Grants Staff Guide	Concise instructions for managing sponsored funding in the Grants solution, from application submission through award close-out.
Grants Advanced Reports Guide	Concise instructions for generating, printing, and exporting Advanced Reports.

3 items

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Grants > Help Center

## Help Center

Guides

Videos

Name	Description
<a href="#">Introduction to Funding Proposals</a>	How the Grants solution helps you manage the sponsored funding application process from proposal authoring to submission.
<a href="#">Managing Multi-Project Proposals with Huron Grants</a>	This video shows how to create a multi-project proposal and its components in the Grants solution and manage them through the application process to submission.
<a href="#">Introduction to Awards</a>	How the Grants solution helps you manage funding awards from award creation to completion.
<a href="#">Introduction to Award Modifications</a>	How the Grants solution helps you manage changes to awards from requesting and creating an award modification to its approval.

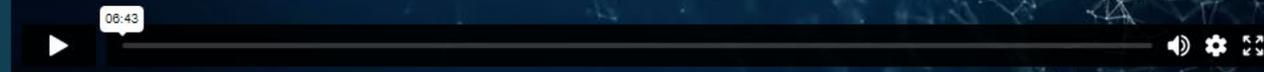
4 items

◀ page 1 of 1 ▶

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Grants

# Introduction to Award Modifications



Introduction to Award Modifications 10.1

Agreements > Help Center

## Help Center

Quick Reference		Videos
Name	Description	
<a href="#">Agreements Researcher's Guide</a>	A guide for researchers and agreement submitters that includes steps for submitting a new agreement or amendment and responding to reviewer clarification requests.	
<a href="#">Agreements Reviewer's Guide</a>	A guide for those assigned to review an agreement that includes steps for submitting an ancillary review.	
<a href="#">Agreements Staff Guide</a>	A guide for Agreements office staff that includes the Agreements workflow along with steps for tracking and managing reviews and finalizing agreements.	

3 items

◀ page 1 of 1 ▶

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Export to CSV ⚙



AUBURN UNIVERSITY

Office of the Senior Vice President  
Research and Economic Development

# Questions?