



ANIMAL RESOURCE CENTER

ARC Orders & Billing

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Introduction

The iRIS™ Animal Resource Center (ARC) module groups tasks relevant to management of studies involving animal subjects. ARC includes tools to assist with livestock management, livestock facilities management, and livestock and materials ordering and billing.

This manual is focused on review board configuration of ARC livestock and materials ordering and billing functions. Please see the ARC Orders and Billing Processing manual for details of study-side order and billing functionality.

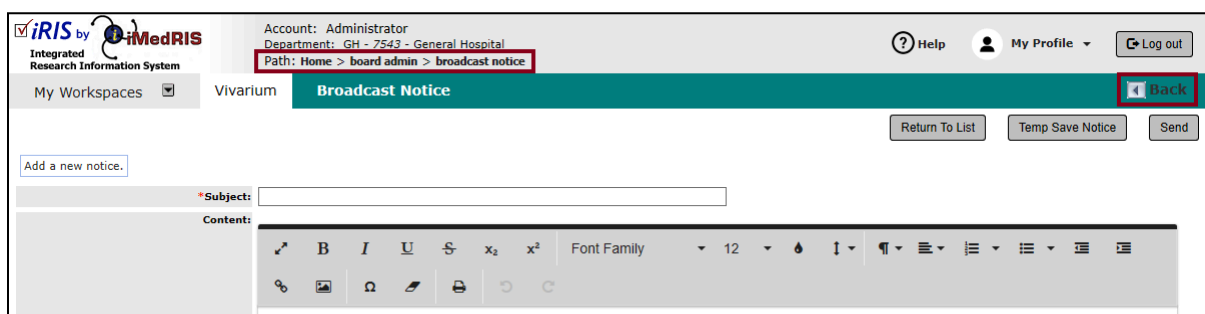
Navigation in iRIS™

iRIS™ includes two standard navigation tools on all pages nested one or more levels beneath the primary Workspace page of the module currently in use (e.g., Study Assistant, Conflict of Interest Assistant, Animal Resource Center, etc.): a Path directory tree, and Back buttons.

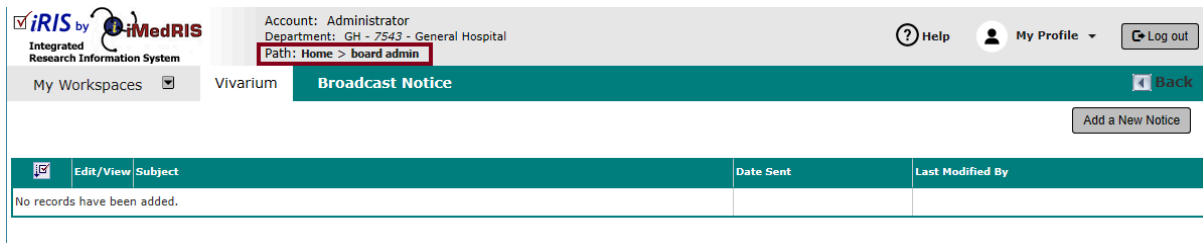
Path Directory Tree

The **Path** item at the upper left of iRIS™ pages provides a hyperlinked menu directory tree, allowing the user to quickly navigate back through the path they followed to get to their current location. **Path** appears on all pages nested at least one level beneath the main workspace

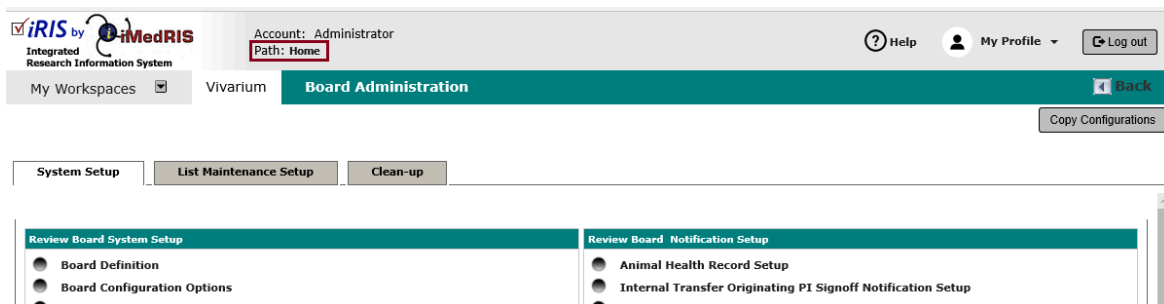
In the example shown the user is viewing the **Broadcast Notice Add a new notice** page. This page is nested three levels beneath the main workspace page, as indicated by the three links available in the **Path** directory tree: **Home**, **board admin** and **broadcast notice**.



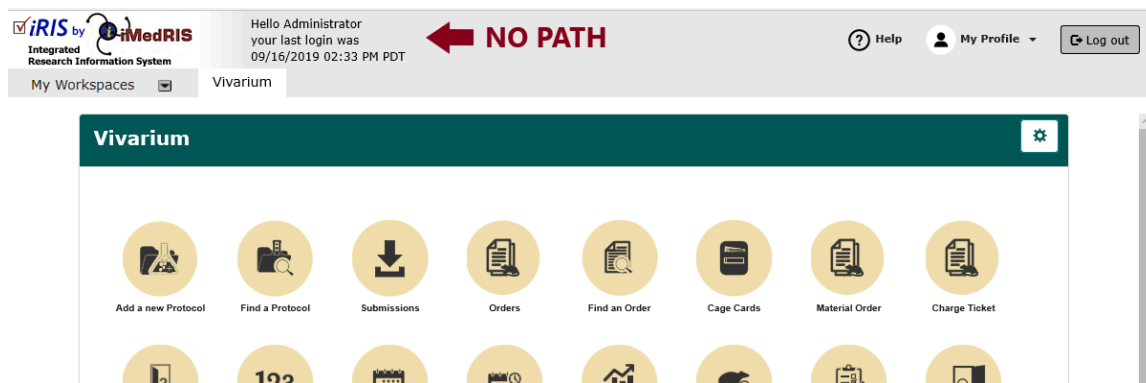
Click on **broadcast notice** in the **Path** to navigate up one level in the directory tree, to the main **Broadcast Notice** page. There are now two levels in the **Path** directory tree: **board admin** and **Home**.



Click on **board admin** in the **Path** to navigate up one level in the directory tree, to the **Board Administration** page. There is now one level in the **Path: Home**.



Click on **Home** in the **Path** to navigate up one level in the directory tree, to the main Workspace page. No Path item is displayed here because the user is now at the top-most level of the directory tree.



Back Button

The second navigation tool is the **Back** button, which appears on all pages nested at least one level beneath the main workspace. The **Back** button takes the user to the same location as the last link shown in the **Path**.

Account: Administrator
Department: GH - 7543 - General Hospital
Path: Home > board admin > broadcast notice

My Workspaces Vivarium Broadcast Notice Back

Return To List Temp Save Notice Send

Add a new notice.

*Subject:

Content:

Rich text editor with bold, italic, underline, link, unlink, bulleted list, numbered list, indent, outdent, font family, font size, text color, background color, undo, redo buttons.

In the example shown above, both the **Back** button and the **broadcast notice** link in the **Path** return the user to the **Broadcast Notice** page:

Account: Administrator
Department: GH - 7543 - General Hospital
Path: Home > board admin

My Workspaces Vivarium Broadcast Notice Back

Add a New Notice

Edit/View	Subject	Date Sent	Last Modified By
No records have been added.			

Clicking the **Back** button on the **Broadcast Notice** page returns the user to the Board Administration page, as indicated by the last link in the **Path** directory tree shown in the screenshot above.

*Note that where the **Back** button appears on a page with editable fields or document upload controls, clicking the button before saving changes returns the user to the same location as the last link shown in the **Path** without saving changes.*

Setup Pricing Level

The iRIS™ system includes tools for configuration of Animal Resource Center (ARC) pricing rate markup and discount categories via the **ARC - Setup Pricing Level** page. To access the page, navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Pricing Level** link.

My Workspaces  Vivarium **Board Administration**

System Setup | List Maintenance Setup | Clean-up

Review Board System Setup

- Board Definition
- Board Configuration Options
- Broadcast Notice
- Business Associate List
- Setup Committee List
- Setup Review Board Roles
- Setup Role Access
- **Setup Pricing Level** 
- Setup Order Status
- Setup Order Numbering
- Setup Ticket Numbering
- Setup Material Order List

The **ARC - Setup Pricing Level** page opens.

My Workspaces  Vivarium **ARC-Setup Pricing Level** 

[Add a New Pricing Level](#) [Deactivate Pricing Level\(s\)](#)

	Show History	Edit 	Pricing Levels	Percentage Currently in Effect	Effective Date	Expiration Date
☐			Internal	0.00	09/01/2019	09/01/2020
☐			External	15.00	09/01/2019	09/01/2020
☐			External Commercial	30.00	09/01/2019	09/01/2020
☐			External (Discounted)	5.00	09/01/2019	09/01/2020

Add Pricing Level

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Pricing Level** link.

My Workspaces Vivarium **Board Administration**

System Setup | List Maintenance Setup | Clean-up

Review Board System Setup

- Board Definition
- Board Configuration Options
- Broadcast Notice
- Business Associate List
- Setup Committee List
- Setup Review Board Roles
- Setup Role Access
- Setup Pricing Level**
- Setup Order Status
- Setup Order Numbering
- Setup Ticket Numbering
- Setup Material Order List

The **ARC - Setup Pricing Level** page opens. Click the **Add a New Pricing Level** button.

My Workspaces Vivarium **ARC-Setup Pricing Level**

Add a New Pricing Level Deactivate Pricing Level(s)

	Show History	Edit	Pricing Levels	Percentage Currently in Effect	Effective Date	Expiration Date
☐			Internal	0.00	09/01/2019	09/01/2020
☐			External	15.00	09/01/2019	09/01/2020
☐			External Commercial	30.00	09/01/2019	09/01/2020
☐			External (Discounted)	5.00	09/01/2019	09/01/2020

An add panel is opened for creation of the new record.

My Workspaces Vivarium **ARC-Setup Pricing Level**

Save

*Pricing Level Type: Internal Discounted

*Rate: -5.00 %

*Effective Date: 09/01/2019

*Expiration Date: 09/01/2020

Comments: Standard price reduced by 5% for internal transactions

Enter the desired **Pricing Level Type**, **Rate** and **Comments**.

Note that negative numbers are permitted in the **Rate** field. Entering a negative number here applies a discount rate.

Enter the **Effective Date** and **Expiration Date** manually or click on the calendar button to open a calendar widget. If using the widget, navigate to the desired date and click it to select.

My Workspaces ▾ Vivarium **ARC-Setup Pricing Level** [Back](#)

*Pricing Level Type: Internal Discounted

*Rate: -5.00 %

*Effective Date: 09/01/2019

*Expiration Date:

Comments:

Su Mo Tu We Th Fr Sa

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Click the **Save** button. The record is added on the **ARC - Setup Pricing Level** page.

My Workspaces ▾ Vivarium			ARC-Setup Pricing Level Back			
			Add a New Pricing Level		Deactivate Pricing Level(s)	
	Show History	Edit	Pricing Levels	Percentage Currently in Effect	Effective Date	Expiration Date
☐			Internal	0.00	09/01/2019	09/01/2020
☐			External	15.00	09/01/2019	09/01/2020
☐			External Commercial	30.00	09/01/2019	09/01/2020
☐			External (Discounted)	5.00	09/01/2019	09/01/2020
☐			Internal Discounted	-5.00	09/01/2019	09/01/2020

Edit Pricing Level

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Pricing Level** link.

My Workspaces Vivarium **Board Administration**

System Setup | List Maintenance Setup | Clean-up

Review Board System Setup

- Board Definition
- Board Configuration Options
- Broadcast Notice
- Business Associate List
- Setup Committee List
- Setup Review Board Roles
- Setup Role Access
- Setup Pricing Level
- Setup Order Status
- Setup Order Numbering
- Setup Ticket Numbering
- Setup Material Order List

The **ARC - Setup Pricing Level** page opens. Click the icon in the **Edit** column for the applicable record.

My Workspaces Vivarium **ARC-Setup Pricing Level** Back

Add a New Pricing Level Deactivate Pricing Level(s)

	Show History	Edit	Pricing Levels	Percentage Currently in Effect	Effective Date	Expiration Date
☐			Internal	0.00	09/01/2019	09/01/2020
☐			External	15.00	09/01/2019	09/01/2020
☐			External Commercial	30.00	09/01/2019	09/01/2020
☐			External (Discounted)	5.00	09/01/2019	09/01/2020
☐			Internal Discounted	-5.00	09/01/2019	09/01/2020

The record is opened in an edit panel.

My Workspaces Vivarium **ARC-Setup Pricing Level** Back

Save

*Pricing Level Type: External Discounted

*Rate: 5.00 %

*Effective Date: 09/01/2019

*Expiration Date: 09/01/2020

Comments: External order discounted rate

Make desired changes to **Pricing Level Type**, **Rate** and **Comments**.

*Note that negative numbers are permitted in the **Rate** field. Entering a negative number here applies a discount rate.*

Enter the **Effective Date** and **Expiration Date** manually or click on the calendar button to open a calendar widget. If using the widget, navigate to the desired date and click it to select.

My Workspaces ▾ Vivarium **ARC-Setup Pricing Level** [Back](#)

[Save](#)

*Pricing Level Type: Internal Discounted

*Rate: -5.00 %

*Effective Date: 09/01/2019  

*Expiration Date: Sep 2019

Comments:

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Click the **Save** button. The record is revised on the **ARC - Setup Pricing Level** page.

My Workspaces ▾ Vivarium **ARC-Setup Pricing Level** [Back](#)

[Add a New Pricing Level](#) [Deactivate Pricing Level\(s\)](#)

	Show History	Edit	Pricing Levels	Percentage Currently in Effect	Effective Date	Expiration Date
☐			Internal	0.00	09/01/2019	09/01/2020
☐			External	15.00	09/01/2019	09/01/2020
☐			External Commercial	30.00	09/01/2019	09/01/2020
☐			External Discounted	5.00	09/01/2019	09/01/2020
☐			Internal Discounted	-5.00	09/01/2019	09/01/2020

Deactivate Pricing Level

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Pricing Level** link.

My Workspaces ▾ Vivarium **Board Administration**

System Setup **List Maintenance Setup** **Clean-up**

Review Board System Setup

- Board Definition
- Board Configuration Options
- Broadcast Notice
- Business Associate List
- Setup Committee List
- Setup Review Board Roles
- Setup Role Access
- Setup Pricing Level 
- Setup Order Status
- Setup Order Numbering

The **ARC - Setup Pricing Level** page opens.

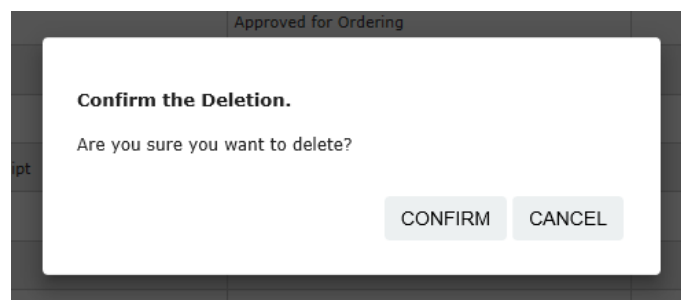
My Workspaces Vivarium **ARC-Setup Pricing Level** Back

[Add a New Pricing Level](#) [Deactivate Pricing Level\(s\)](#)

	Show History	Edit	Pricing Levels	Percentage Currently in Effect	Effective Date	Expiration Date
☐			Internal	0.00	09/01/2019	09/01/2020
☐			External	15.00	09/01/2019	09/01/2020
☐			External Commercial	30.00	09/01/2019	09/01/2020
☐			External Discounted	5.00	09/01/2019	09/01/2020
☒			Internal Discounted	-5.00	09/01/2019	09/01/2020

Select the checkbox(es) in the far-left column for the record(s) to be deleted and click the **Deactivate Pricing Level(s)** button.

A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The record is deleted on the **ARC - Setup Pricing Level** page.

My Workspaces Vivarium **ARC-Setup Pricing Level** Back

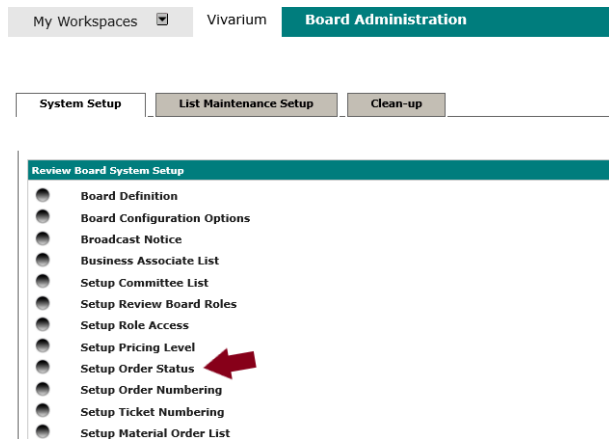
[Add a New Pricing Level](#) [Deactivate Pricing Level\(s\)](#)

	Show History	Edit	Pricing Levels	Percentage Currently in Effect	Effective Date	Expiration Date
☐			Internal	0.00	09/01/2019	09/01/2020
☐			External	15.00	09/01/2019	09/01/2020
☐			External Commercial	30.00	09/01/2019	09/01/2020
☐			External Discounted	5.00	09/01/2019	09/01/2020

Setup Order Status

Order statuses are highly configurable in the iRIS™ system, which allows for creation, revision, deletion and color-coding of custom statuses. The system also provides eleven default system statuses, which are editable but cannot be deleted.

To view the order status list, navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Order Status** link.



The **Setup Order Status** page opens.

My Workspaces Vivarium **Setup Order Status** Back

Add a New Order Status Delete selected Order Status

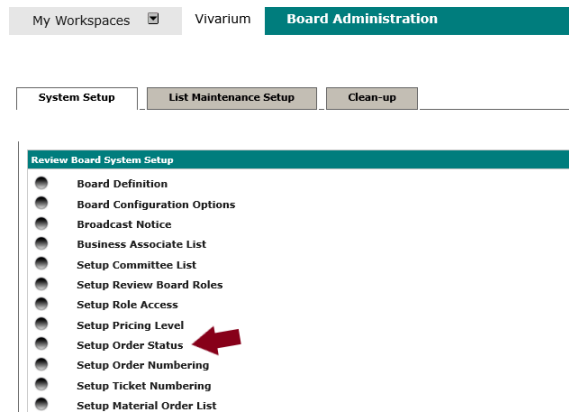
11 result(s) found...

	Edit	Order Status	Order Status Queue	Sort Order	Background Color
		Draft	Unknown	1	Draft
		New Request	Approved for Ordering	2	New Request
		Pending Approval	Pending Approval	3	Pending Approval
		Approved for Ordering	Approved for Ordering	4	Approved for Ordering
		Ordered - Pending Receipt	In Progress Orders	5	Ordered - Pending Receipt
		In Quarantine	In Quarantine	6	In Quarantine
		Completed	Completed	7	Completed
		Denied	Denied	8	Denied
		Received Orders	Received Orders	9	Received Orders
		Reconciled	Reconciled	10	Reconciled
		Pending Orders to Vendor	Pending Orders to Vendor	11	Pending Orders to Vendor

The **Order Status** items shown in the screenshot above are system default entries. Some details of these statuses can be edited, but system default statuses cannot be deleted.

Edit Order Status

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Order Status** link.



The **Setup Order Status** page opens. Click the icon in the **Edit** column for the applicable record.

My Workspaces ▾ Vivarium **Setup Order Status** [Back](#)

[Add a New Order Status](#) [Delete selected Order Status](#)

11 result(s) found...

IS	Edit	Order Status	Order Status Queue	Sort Order	Background Color
		Draft	Unknown	1	Draft
		New Request	Approved for Ordering	2	New Request
		Pending Approval	Pending Approval	3	Pending Approval
		Approved for Ordering	Approved for Ordering	4	Approved for Ordering
		Ordered - Pending Receipt	In Progress Orders	5	Ordered - Pending Receipt
		In Quarantine	In Quarantine	6	In Quarantine
		Completed	Completed	7	Completed
		Denied	Denied	8	Denied
		Received Orders	Received Orders	9	Received Orders
		Reconciled	Reconciled	10	Reconciled
		Pending Orders to Vendor	Pending Orders to Vendor	11	Pending Orders to Vendor

The record is opened in an edit panel.

My Workspaces ▾ Vivarium **Setup Order Status** [Back](#)

[Save the Order Status](#)

*Order Status:	Draft
*Order Status Queue:	Unknown
*Sort Order:	1
Text Color:	#FFFFFF
Background Color:	#330099
Preview:	Draft

*Note that the first two fields, **Order Status** and **Order Status Queue**, are view-only fields that cannot be edited. This is because the open record is a system default **Order Status**.*

The **Sort Order**, **Text Color** and **Background Color** fields are editable. A **Preview** of the selected **Text Color** / **Background Color** combination is provided at the bottom.

The **Sort Order** field sets the sort order for the status wherever it appears in a list in the iRIS™ system.

Duplicate **Sort Order** numbers are allowed, meaning that two or more statuses can occupy the same sort order level. Where two or more statuses have the same **Sort Order** number assigned, a secondary, ascending alphabetic sort is applied to the status name.

Enter a hexadecimal value in the **Text Color** field or click the desired color swatch square to select from the color grid.

Enter a hexadecimal value in the **Background Color** field or click the desired color swatch square to select from the color grid.

My Workspaces ☒ Vivarium **Setup Order Status** [Back](#)

***Order Status:** Draft

***Order Status Queue:** Unknown

***Sort Order:** 1

Text Color: #00FF00

Background Color: #330099

Preview: Draft

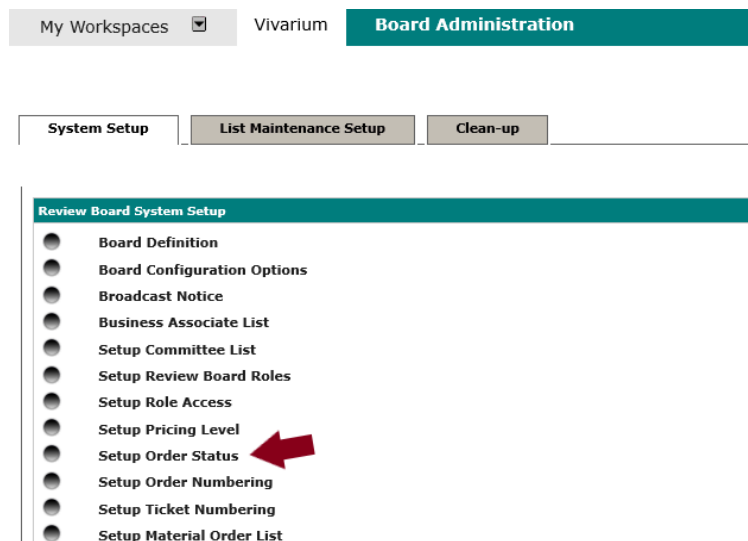
Save the Order Status

In the screenshot above, the color sample box for **Text Color** was clicked and the color swatch square at the upper right corner, a shade of bright green, was selected. The system automatically populated the **Text Color** field with the corresponding hexadecimal color code, #00FF00, and updated the **Preview** sample with the selected text color. Color changes can be previewed without saving changes.

When desired changes are complete, click the **Save the Order Status** button to save changes and close the edit panel.

Add Order Status

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Order Status** link.



The **Setup Order Status** page opens. Click the **Add a New Order Status** button.

My Workspaces

Vivarium

Setup Order Status

Back

Add a New Order Status

Delete selected Order Status

11 result(s) found...

	Edit	Order Status	Order Status Queue	Sort Order	Background Color
		Draft	Unknown	1	Draft
		New Request	Approved for Ordering	2	New Request
		Pending Approval	Pending Approval	3	Pending Approval
		Approved for Ordering	Approved for Ordering	4	Approved for Ordering
		Ordered - Pending Receipt	In Progress Orders	5	Ordered - Pending Receipt
		In Quarantine	In Quarantine	6	In Quarantine
		Completed	Completed	7	Completed
		Denied	Denied	8	Denied
		Received Orders	Received Orders	9	Received Orders
		Reconciled	Reconciled	10	Reconciled
		Pending Orders to Vendor	Pending Orders to Vendor	11	Pending Orders to Vendor

The **Setup Order Status** panel opens.

Enter the desired **Order Status** name (e.g., “On Hold”, “Withdrawn”, etc.). The name chosen should be descriptive and should not duplicate any existing statuses.

Open the **Order Status Queue** dropdown list and click the applicable status to select it.

The **Sort Order**, **Text Color** and **Background Color** fields are editable. A **Preview** of the selected **Text Color** / **Background Color** combination is provided at the bottom.

The **Sort Order** field sets the sort order for the status wherever it appears in a list in the iRIS™ system.

Duplicate **Sort Order** numbers are allowed, meaning that two or more statuses can occupy the same sort order level. Where two or more statuses have the same **Sort Order** number assigned, a secondary, ascending alphabetic sort is applied to the status name.

Enter a hexadecimal value in the **Text Color** field or click the desired color swatch square to select from the color grid.

Enter a hexadecimal value in the **Background Color** field or click the desired color swatch square to select from the color grid.

My Workspaces ▾ Vivarium Setup Order Status Back

Save the Order Status

*Order Status: On Hold

*Order Status Queue: Incomplete Orders

*Sort Order: 1

Text Color: #00FF00

Background Color: #990000

Preview: On Hold

In the example shown above, the color sample box for **Text Color** was clicked and the color swatch square at the upper right corner, a shade of bright green, was clicked to select it. The system automatically populated the **Text Color** field with the corresponding hexadecimal color code, #00FF00, and updated the **Preview** sample with the selected text color. Color changes can be previewed without saving changes.

When desired changes are complete, click the **Save the Order Status** button to save the record and close the add panel.

The new record is added on the **Setup Order Status** page.

My Workspaces ▾ Vivarium Setup Order Status Back

Add a New Order Status Delete selected Order Status

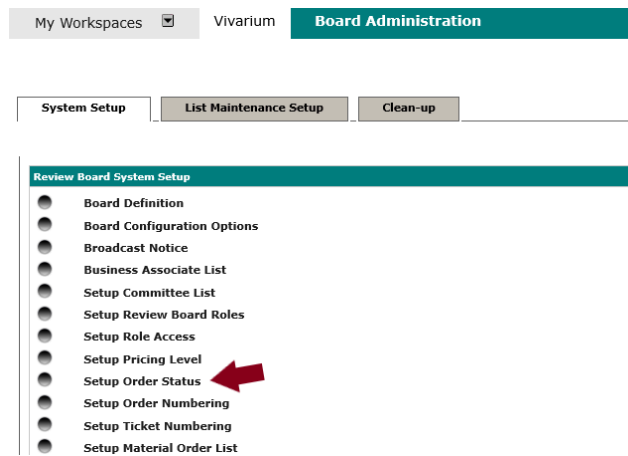
12 result(s) found...

	Edit	Order Status	Order Status Queue	Sort Order	Background Color
		Draft	Unknown	1	Draft
		New Request	Approved for Ordering	2	New Request
		Pending Approval	Pending Approval	3	Pending Approval
		Approved for Ordering	Approved for Ordering	4	Approved for Ordering
		Ordered - Pending Receipt	In Progress Orders	5	Ordered - Pending Receipt
		In Quarantine	In Quarantine	6	In Quarantine
		Completed	Completed	7	Completed
		Denied	Denied	8	Denied
		Received Orders	Received Orders	9	Received Orders
		Reconciled	Reconciled	10	Reconciled
		Pending Orders to Vendor	Pending Orders to Vendor	11	Pending Orders to Vendor
☐		Withdrawn	Incomplete Orders	12	Withdrawn

Note the select box at far left for the new **Order Status**. Because this is not a system default **Order Status**, it can be deleted. Also, its fields are all unlocked when the record is opened for editing, including the **Order Status** and **Order Status Queue** fields, which are locked for system default **Order Status** items.

Delete Order Status

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Order Status** link.



The **Setup Order Status** page opens.

Select the checkbox(es) in the far-left column for the record(s) to be deleted and click the **Delete Selected Order Status** button.

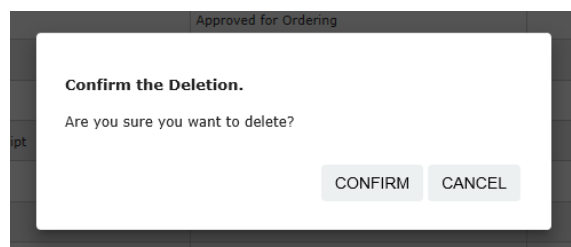
My Workspaces ▾ Vivarium **Setup Order Status** [Back](#)

[Add a New Order Status](#) [Delete selected Order Status](#)

12 result(s) found...

☐	Edit	Order Status	Order Status Queue	Sort Order	Background Color
☐		Draft	Unknown	1	Draft
☐		New Request	Approved for Ordering	2	New Request
☐		Pending Approval	Pending Approval	3	Pending Approval
☐		Approved for Ordering	Approved for Ordering	4	Approved for Ordering
☐		Ordered - Pending Receipt	In Progress Orders	5	Ordered - Pending Receipt
☐		In Quarantine	In Quarantine	6	In Quarantine
☐		Completed	Completed	7	Completed
☐		Denied	Denied	8	Denied
☐		Received Orders	Received Orders	9	Received Orders
☐		Reconciled	Reconciled	10	Reconciled
☐		Pending Orders to Vendor	Pending Orders to Vendor	11	Pending Orders to Vendor
☐		Withdrawn	Incomplete Orders	12	Withdrawn

A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The record is deleted on the **Setup Order Status** page.

My Workspaces

Vivarium

Setup Order Status

Back

Add a New Order Status

Delete selected Order Status

11 result(s) found...

☐	Edit	Order Status	Order Status Queue	Sort Order	Background Color
☐		Draft	Unknown	1	Draft
☐		New Request	Approved for Ordering	2	New Request
☐		Pending Approval	Pending Approval	3	Pending Approval
☐		Approved for Ordering	Approved for Ordering	4	Approved for Ordering
☐		Ordered - Pending Receipt	In Progress Orders	5	Ordered - Pending Receipt
☐		In Quarantine	In Quarantine	6	In Quarantine
☐		Completed	Completed	7	Completed
☐		Denied	Denied	8	Denied
☐		Received Orders	Received Orders	9	Received Orders
☐		Reconciled	Reconciled	10	Reconciled
☐		Pending Orders to Vendor	Pending Orders to Vendor	11	Pending Orders to Vendor

Setup Order Numbering

iRIS™ provides tools for detailed configuration of order numbers, enabling inclusion of a boilerplate prefix, calendar year, a system generated number, or a combination of all three options.

To view the order numbering setup page, navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Order Numbering** link.

My Workspaces Vivarium **Board Administration**

System Setup | List Maintenance Setup | Clean-up

Review Board System Setup

- Board Definition
- Board Configuration Options
- Broadcast Notice
- Business Associate List
- Setup Committee List
- Setup Review Board Roles
- Setup Role Access
- Setup Pricing Level
- Setup Order Status
- Setup Order Numbering**
- Setup Ticket Numbering
- Setup Material Order List
- Setup Material Order Item List

The **Setup Order Numbering** page opens.

My Workspaces Vivarium **Setup Order Numbering**

Use in Number	Description of Number Part	Number Part Information	Separator
☒	Constant Prefix	ORDER	-
☒	Calendar Year	☒ All 4 digits ☐ Last 2 digits	-
☒	System Generated Number	47 ☒ Zero Pad the Sequence Number Number of Digits 3	

As shown in the **Description of Number Part** column in the screenshot above, the order number can be configured to include a **Constant Prefix**, **Calendar Year** and **System Generated Number**. Selecting the checkbox in the **Use in Number** column includes all items in that row in the numbering scheme.

The **System Generated Number** primarily consists of a sequence number which is incremented by one (1) for each new order number generated by the scheme. Options to pad the sequence number with leading zeroes and set a fixed digit count for **System Generated Numbers** are available, as shown in the screenshot above. Fields in the example above are filled as follows.

The **Constant Prefix** is “ORDER”.

The first **Separator** field contains a “-”, indicating a dash will appear between the **Constant Prefix** and the **Calendar Year**.

The **All 4 digits** of the current **Calendar Year** are “2019”.

The second **Separator** field contains a “-”, indicating a dash will appear between the **Calendar Year** and **System Generated Number**.

The first sequence number to be used is “47”, the checkbox for **Zero Pad the Sequence Number** is selected and **Number of Digits** is set to “3”.

The first order number generated by this scheme would be:

ORDER-2019-047

Click the **Save Numbering** button to save the numbering scheme.

Setup Ticket Numbering

iRIS™ provides tools for detailed configuration of ticket numbers, enabling inclusion of a boilerplate prefix, calendar year, system generated number, or a combination of all three options.

To view the ticket numbering setup page, navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Ticket Numbering** link.

My Workspaces Vivarium **Board Administration**

System Setup List Maintenance Setup Clean-up

Review Board System Setup

- Board Definition
- Board Configuration Options
- Broadcast Notice
- Business Associate List
- Setup Committee List
- Setup Review Board Roles
- Setup Role Access
- Setup Pricing Level
- Setup Order Status
- Setup Order Numbering
- **Setup Ticket Numbering**
- Setup Material Order List
- Setup Material Order Item List

The **Setup Ticket Numbering** page opens.

My Workspaces Vivarium **Setup Ticket Numbering** Back

Save Numbering

Use in Number	Description of Number Part	Number Part Information	Separator
☒	Constant Prefix	TT	-
☒	Calendar Year	☐ All 4 digits ☒ Last 2 digits	-
☒	System Generated Number	20 ☒ Zero Pad the Sequence Number Number of Digits 3	

As shown in the **Description of Number Part** column in the screenshot above, the **Ticket Number** can be configured to include a **Constant Prefix**, **Calendar Year** and **System Generated Number**. Selecting the checkbox in the **Use in Number** column includes all items in that row in the numbering scheme.

The **System Generated Number** primarily consists of a sequence number which is incremented by one (1) for each new ticket number generated by the scheme. Options to pad the sequence number with leading zeroes and set a fixed digit count for **System Generated Numbers** are available, as shown in the screenshot above. Fields in the example above are filled as follows.

The **Constant Prefix** is “TT”.

The first **Separator** character is “ – ”, indicating a dash will appear between the **Constant Prefix** and the **Calendar Year**.

The **Last 2 digits** of the current **Calendar Year** are “19”.

The second **Separator** character is “ – ”, indicating a dash will appear between the **Calendar Year** and the **System Generated Number**.

The first sequence number to be used is “20”, the checkbox for **Zero Pad the Sequence Number** is selected and **Number of Digits** is set to “3”.

The first ticket number generated by this scheme would be:

TT-19-020

Click the **Save Numbering** button to save the numbering scheme.

Setup Material Order List

The iRIS™ system includes material order status, order method, payment option and next action list configuration tools on the **Setup Material Order List** page. To access the page, navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order List** link.

My Workspaces  Vivarium **Board Administration**

System Setup | **List Maintenance Setup** | **Clean-up**

-  **Setup Pricing Level**
-  **Setup Order Status**
-  **Setup Order Numbering**
-  **Setup Ticket Numbering**
-  **Setup Material Order List** 
-  **Setup Material Order Item List**
-  **Setup Transfer Numbering**
-  **Setup Wean Numbering**
-  **Setup Facilities/Buildings/Floors/Room**

The **Setup Material Order List** page opens.

My Workspaces  Vivarium **Setup Material Order List** 

3 result(s) found...  

		Payment
☐		Credit
☐		Cash
☐		Debit

1 result(s) found...  

		Next Action
☐		Generate purchase order

5 result(s) found...  

		Order Status
☐		In progress
☐		Completed
☐		Pending
☐		Order Received
☐		Preparing Order

3 result(s) found...  

		Order Method
☐		Email
☐		Web
☐		Mail

The page includes four sections:

Setup Payment Options — list of acceptable forms of payment to the institution

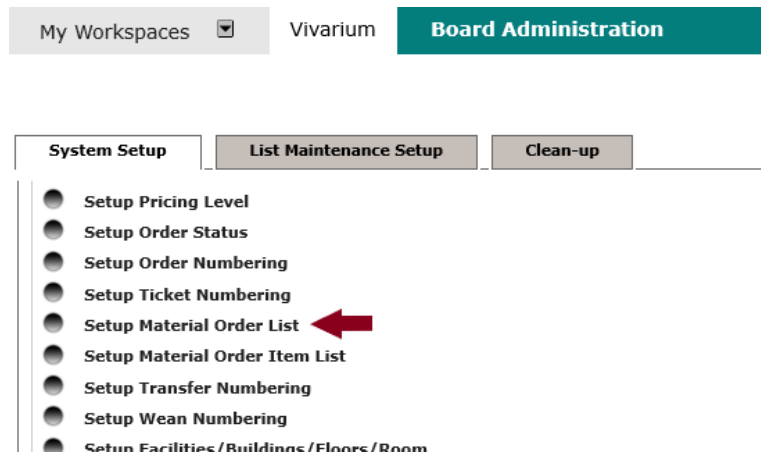
Setup Next Action — list of possible next actions to take following receipt of a material order or payment

Setup Order Status — list of possible statuses for material orders

Setup Order Method — list of possible material order methods

Setup Material Payment Options

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order List** link.



The **Setup Material Order List** page opens.

My Workspaces ▾ Vivarium **Setup Material Order List**

4 result(s) found...

	Edit	Payment
☐		Credit
☐		Cash
☐		Debit
☐		Purchase Order

1 result(s) found...

	Edit	Next Action
☐		Generate purchase order

5 result(s) found...

	Edit	Order Status
☐		In progress
☐		Completed
☐		Pending
☐		Order Received
☐		Preparing Order

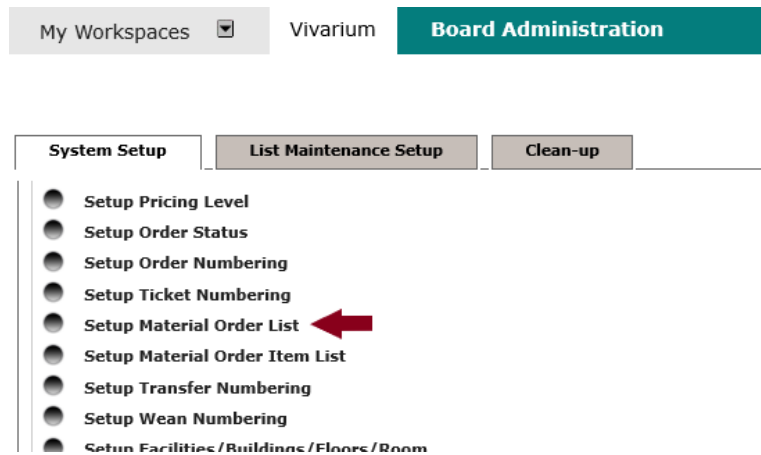
3 result(s) found...

	Edit	Order Method
☐		Email
☐		Web
☐		Mail

The first section on the page is **Setup Payment Options**.

Add Material Payment Option

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order List** link.



The **Setup Material Order List** page opens.

The screenshot shows the 'Setup Material Order List' page. It contains four sections, each with a table of setup options. The first section, 'Setup Payment Options', is highlighted with a red border.

Setup Payment Options (4 result(s) found...)

Payment
☐ Credit
☐ Cash
☐ Debit
☐ Purchase Order

Setup Next Action (1 result(s) found...)

Next Action
☐ Generate purchase order

Setup Order Status (5 result(s) found...)

Order Status
☐ In progress
☐ Completed
☐ Pending
☐ Order Received
☐ Preparing Order

Setup Order Method (3 result(s) found...)

Order Method
☐ Email
☐ Web
☐ Mail

The first section on the page is **Setup Payment Options**. The **Setup Payment Options** section is shown in isolation for the remainder of this manual subsection.

Click the **Add Payment** button.

3 result(s) found...

Add Payment Delete Payment

Setup Payment Options		
☒	Edit	Payment
☐		Credit
☐		Cash
☐		Debit

The **Setup Payment Options** page opens. Enter a form of **Payment** and click the **Save Payment** button.

My Workspaces Vivarium **Setup Payment Options** Back

Save Payment

*Payment :

The record is added in the **Setup Payment Options** section of the **Setup Material Order List** page.

4 result(s) found...

Add Payment Delete Payment

Setup Payment Options		
☒	Edit	Payment
☐		Credit
☐		Cash
☐		Debit
☐		Purchase Order

Edit Material Payment Option

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order List** link.

My Workspaces Vivarium **Board Administration**

System Setup **List Maintenance Setup** Clean-up

- Setup Pricing Level
- Setup Order Status
- Setup Order Numbering
- Setup Ticket Numbering
- Setup Material Order List
- Setup Material Order Item List
- Setup Transfer Numbering
- Setup Wean Numbering
- Setup Facilities / Buildings / Floors / Room

The **Setup Material Order List** page opens.

My Workspaces Vivarium **Setup Material Order List** [Back](#)

4 result(s) found...

[Add Payment](#) [Delete Payment](#)

	Edit	Payment
☐		Credit
☐		Cash
☐		Debit
☐		Purchase Order

1 result(s) found...

[Add Next Action](#) [Delete Next Action](#)

	Edit	Next Action
☐		Generate purchase order

5 result(s) found...

[Add Order Status](#) [Delete Order Status](#)

	Edit	Order Status
☐		In progress
☐		Completed
☐		Pending
☐		Order Received
☐		Preparing Order

3 result(s) found...

[Add Order Method](#) [Delete Order Method](#)

	Edit	Order Method
☐		Email
☐		Web
☐		Mail

The first section on the page is **Setup Payment Options**. The **Setup Payment Options** section is shown in isolation for the remainder of this manual subsection.

Click the icon in the **Edit** column for the applicable record.

4 result(s) found...

[Add Payment](#) [Delete Payment](#)

	Edit	Payment
☐		Credit
☐		Cash
☐		Debit
☐		Purchase Order

The **Setup Payment Options** page opens. Make desired changes to the form of **Payment** and click the **Save Payment** button.

My Workspaces  Vivarium **Setup Payment Options**  Back

***Payment :** 

Save Payment

The record is revised in the **Setup Payment Options** section of the **Setup Material Order List** page.

Add Payment Delete Payment

4 result(s) found...

Setup Payment Options		
	Edit	Payment
☐		Credit
☐		Cash
☐		Debit
☐		Purchase Order, External

Delete Material Payment Option

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order List** link.

My Workspaces  Vivarium **Board Administration**

System Setup List Maintenance Setup Clean-up

- Setup Pricing Level
- Setup Order Status
- Setup Order Numbering
- Setup Ticket Numbering
- Setup Material Order List 
- Setup Material Order Item List
- Setup Transfer Numbering
- Setup Wean Numbering
- Setup Facilities/Buildings/Floors/Room

The **Setup Material Order List** page opens.

My Workspaces Vivarium Setup Material Order List

4 result(s) found... [Add Payment](#) [Delete Payment](#)

	Edit	Payment
☐		Credit
☐		Cash
☐		Debit
☐		Purchase Order, External

1 result(s) found... [Add Next Action](#) [Delete Next Action](#)

	Edit	Next Action
☐		Generate purchase order

5 result(s) found... [Add Order Status](#) [Delete Order Status](#)

	Edit	Order Status
☐		In progress
☐		Completed
☐		Pending
☐		Order Received
☐		Preparing Order

3 result(s) found... [Add Order Method](#) [Delete Order Method](#)

	Edit	Order Method
☐		Email
☐		Web
☐		Mail

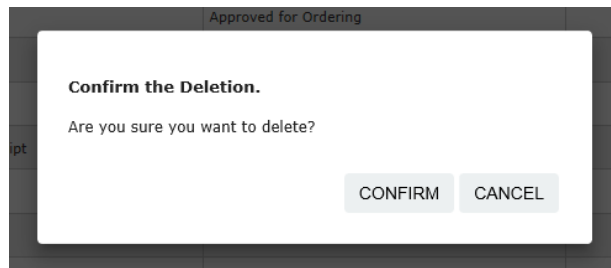
The first section on the page is **Setup Payment Options**. The **Setup Payment Options** section is shown in isolation for the remainder of this manual subsection.

Select the checkbox(es) in the far-left column for the record(s) to be deleted, then click the **Delete Payment** button.

4 result(s) found... [Add Payment](#) [Delete Payment](#)

	Edit	Payment
☐		Credit
☐		Cash
☐		Debit
☒		Purchase Order, External

A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The record is deleted in the **Setup Payment Options** section of the **Setup Material Order List** page.

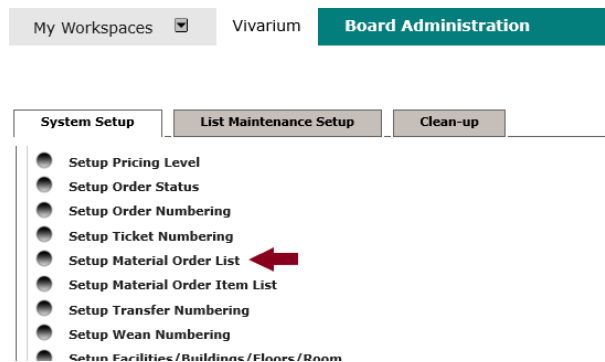
3 result(s) found...

[Add Payment](#) [Delete Payment](#)

Setup Payment Options		
	Edit	Payment
☐		Credit
☐		Cash
☐		Debit

Setup Material Order Next Action

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order List** link.



The **Setup Material Order List** page opens.

My Workspaces ▾ Vivarium **Setup Material Order List** [Back](#)

[Add Payment](#) [Delete Payment](#)

3 result(s) found...

Setup Payment Options		
☐	Edit	Payment
☐		Credit
☐		Cash
☐		Debit

[Add Next Action](#) [Delete Next Action](#)

1 result(s) found...

Setup Next Action		
☐	Edit	Next Action
☐		Generate purchase order

[Add Order Status](#) [Delete Order Status](#)

5 result(s) found...

Setup Order Status		
☐	Edit	Order Status
☐		In progress
☐		Completed
☐		Pending
☐		Order Received
☐		Preparing Order

[Add Order Method](#) [Delete Order Method](#)

3 result(s) found...

Setup Order Method		
☐	Edit	Order Method
☐		Email
☐		Web
☐		Mail

The second section on the page is **Setup Next Action**.

Add Material Order Next Action

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order List** link.

My Workspaces ▾ Vivarium **Board Administration**

System Setup | List Maintenance Setup | Clean-up

- Setup Pricing Level
- Setup Order Status
- Setup Order Numbering
- Setup Ticket Numbering
- **Setup Material Order List** ←
- Setup Material Order Item List
- Setup Transfer Numbering
- Setup Wean Numbering
- Setup Facilities/Buildings/Floors/Room

The **Setup Material Order List** page opens.

My Workspaces Vivarium **Setup Material Order List** [Back](#)

[Add Payment](#) [Delete Payment](#)

3 result(s) found...

	Edit	Payment
☐		Credit
☐		Cash
☐		Debit

[Add Next Action](#) [Delete Next Action](#)

1 result(s) found...

	Edit	Next Action
☐		Generate purchase order

[Add Order Status](#) [Delete Order Status](#)

5 result(s) found...

	Edit	Order Status
☐		In progress
☐		Completed
☐		Pending
☐		Order Received
☐		Preparing Order

[Add Order Method](#) [Delete Order Method](#)

3 result(s) found...

	Edit	Order Method
☐		Email
☐		Web
☐		Mail

The second section on the page is **Setup Next Action**. The **Setup Next Action** section is shown in isolation for the remainder of this manual subsection.

Click the **Add Next Action** button.

[Add Next Action](#) [Delete Next Action](#)

1 result(s) found...

	Edit	Next Action
☐		Generate purchase order

The **Setup Next Action** page opens. Enter a **Next Action** and click the **Save Next Action** button.

My Workspaces Vivarium **Setup Next Action** [Back](#)

[Save Next Action](#)

*Next Action :

The record is added in the **Setup Next Action** section of the **Setup Material Order List** page.

		Add Next Action	Delete Next Action
2 result(s) found...			
Setup Next Action			
☒	Edit	Next Action	
☐		Generate purchase order	
☐		Generate Receipt	

Edit Material Order Next Action

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order List** link.

My Workspaces Vivarium **Board Administration**

System Setup

List Maintenance Setup

Clean-up

- Setup Pricing Level
- Setup Order Status
- Setup Order Numbering
- Setup Ticket Numbering
- Setup Material Order List
- Setup Material Order Item List
- Setup Transfer Numbering
- Setup Wean Numbering
- Setup Facilities/Buildings/Floors/Room

The **Setup Material Order List** page opens.

My Workspaces ▾ Vivarium **Setup Material Order List** 

3 result(s) found... Add Payment Delete Payment

Setup Payment Options		
	Edit	Payment
☐		Credit
☐		Cash
☐		Debit

2 result(s) found... Add Next Action Delete Next Action

Setup Next Action		
	Edit	Next Action
☐		Generate purchase order
☐		Generate Receipt

5 result(s) found... Add Order Status Delete Order Status

Setup Order Status		
	Edit	Order Status
☐		In progress
☐		Completed
☐		Pending
☐		Order Received
☐		Preparing Order

3 result(s) found... Add Order Method Delete Order Method

Setup Order Method		
	Edit	Order Method
☐		Email
☐		Web
☐		Mail

The second section on the page is **Setup Next Action**. The **Setup Next Action** section is shown in isolation for the remainder of this manual subsection.

Click the icon in the **Edit** column for the applicable record.

2 result(s) found... Add Next Action Delete Next Action

Setup Next Action		
	Edit	Next Action
☐		Generate purchase order
☐		Generate Receipt

The **Setup Next Action** page opens. Make desired changes to the **Next Action** and click the **Save Next Action** button.

My Workspaces  Vivarium **Setup Next Action**  Back

Save Next Action

*Next Action :

The record is revised in the **Setup Next Action** section of the **Setup Material Order List** page.

 Add Next Action  Delete Next Action

2 result(s) found...

Setup Next Action		
	Edit 	Next Action
☐		Generate purchase order
☐		Generate receipt pdf

Delete Material Order Next Action

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order List** link.

My Workspaces  Vivarium **Board Administration**

System Setup **List Maintenance Setup** Clean-up

- Setup Pricing Level
- Setup Order Status
- Setup Order Numbering
- Setup Ticket Numbering
- Setup Material Order List 
- Setup Material Order Item List
- Setup Transfer Numbering
- Setup Wean Numbering
- Setup Facilities/Buildings/Floors/Room

The **Setup Material Order List** page opens.

My Workspaces Vivarium Setup Material Order List

3 result(s) found...

Setup Payment Options		
	Edit	Payment
☐		Credit
☐		Cash
☐		Debit

2 result(s) found...

Setup Next Action		
	Edit	Next Action
☐		Generate purchase order
☐		Generate receipt pdf

5 result(s) found...

Setup Order Status		
	Edit	Order Status
☐		In progress
☐		Completed
☐		Pending
☐		Order Received
☐		Preparing Order

3 result(s) found...

Setup Order Method		
	Edit	Order Method
☐		Email
☐		Web
☐		Mail

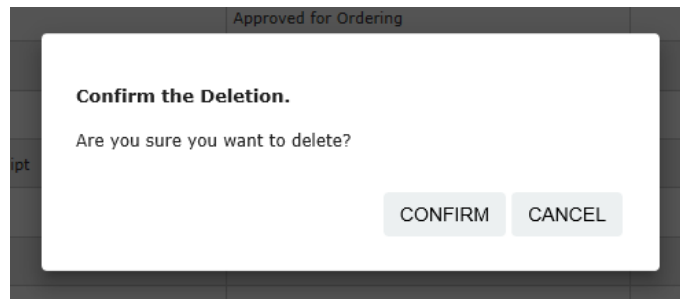
The second section on the page is **Setup Next Action**. The **Setup Next Action** section is shown in isolation for the remainder of this manual subsection.

Select the checkbox(es) in the far-left column for the record(s) to be deleted, then click the **Delete Next Action** button.

2 result(s) found...

Setup Next Action		
	Edit	Next Action
☐		Generate purchase order
☒		Generate receipt pdf

A confirmation popup window displays.



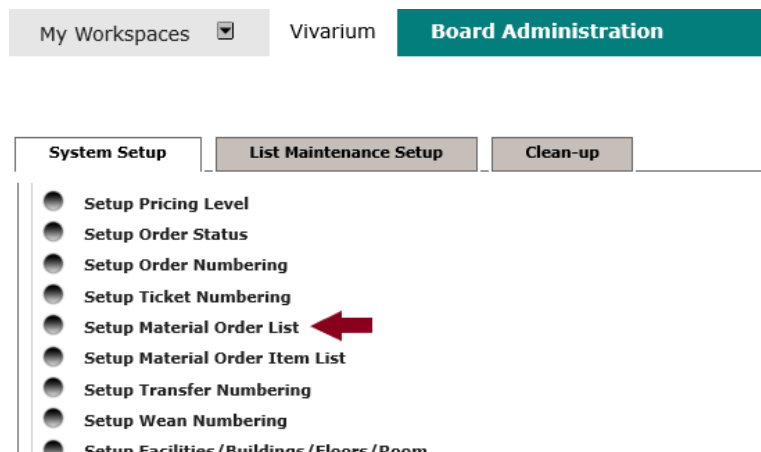
Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The record is deleted in the **Setup Next Action** section of the **Setup Material Order List** page.



Setup Material Order Status

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order List** link.



The **Setup Material Order List** page opens.

My Workspaces Vivarium **Setup Material Order List** Back

[Add Payment](#) [Delete Payment](#)

4 result(s) found...

Setup Payment Options		
	Edit	Payment
☐		Credit
☐		Cash
☐		Debit
☐		Purchase Order, External

[Add Next Action](#) [Delete Next Action](#)

1 result(s) found...

Setup Next Action		
	Edit	Next Action
☐		Generate purchase order

[Add Order Status](#) [Delete Order Status](#)

5 result(s) found...

Setup Order Status		
	Edit	Order Status
☐		In progress
☐		Completed
☐		Pending
☐		Order Received
☐		Preparing Order

[Add Order Method](#) [Delete Order Method](#)

3 result(s) found...

Setup Order Method		
	Edit	Order Method
☐		Email
☐		Web
☐		Mail

The third section on the page is **Setup Order Status**.

Add Material Order Status

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order List** link.

My Workspaces Vivarium **Board Administration**

System Setup **List Maintenance Setup** **Clean-up**

- Setup Pricing Level
- Setup Order Status
- Setup Order Numbering
- Setup Ticket Numbering
- Setup Material Order List
- Setup Material Order Item List
- Setup Transfer Numbering
- Setup Wean Numbering
- Setup Facilities / Buildings / Floors / Room

The **Setup Material Order List** page opens.

My Workspaces
Vivarium
Setup Material Order List
Back

Add Payment
Delete Payment

4 result(s) found...

Setup Payment Options		
	Edit	Payment
☐		Credit
☐		Cash
☐		Debit
☐		Purchase Order, External

Add Next Action
Delete Next Action

1 result(s) found...

Setup Next Action		
	Edit	Next Action
☐		Generate purchase order

Add Order Status
Delete Order Status

5 result(s) found...

Setup Order Status		
	Edit	Order Status
☐		In progress
☐		Completed
☐		Pending
☐		Order Received
☐		Preparing Order

Add Order Method
Delete Order Method

3 result(s) found...

Setup Order Method		
	Edit	Order Method
☐		Email
☐		Web
☐		Mail

The third section on the page is **Setup Order Status**. The **Setup Order Status** section is shown in isolation for the remainder of this manual subsection.

Click the **Add Order Status** button.

Add Order Status
Delete Order Status

5 result(s) found...

Setup Order Status		
	Edit	Order Status
☐		In progress
☐		Completed
☐		Pending
☐		Order Received
☐		Preparing Order

The **Setup Order Status** page opens. Enter an **Order Status** and click the **Save Order Status** button.

My Workspaces  Vivarium **Setup Order Status**  Back

Save Order Status

*Order Status :

The record is added in the **Setup Order Status** section of the **Setup Material Order List** page.

Add Order Status Delete Order Status

6 result(s) found...

Setup Order Status		
	 Edit	Order Status
☐		In progress
☐		Completed
☐		Pending
☐		Order Received
☐		Preparing Order
☐		Cancelled

Edit Material Order Status

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order List** link.

My Workspaces  Vivarium **Board Administration**

System Setup **List Maintenance Setup** **Clean-up**

- Setup Pricing Level
- Setup Order Status
- Setup Order Numbering
- Setup Ticket Numbering
- Setup Material Order List 
- Setup Material Order Item List
- Setup Transfer Numbering
- Setup Wean Numbering
- Setup Facilities / Buildings / Floors / Room

The **Setup Material Order List** page opens.

My Workspaces
Vivarium
Setup Material Order List
Back

Add Payment
Delete Payment

4 result(s) found...

Setup Payment Options		
	Edit	Payment
☐		Credit
☐		Cash
☐		Debit
☐		Purchase Order, External

Add Next Action
Delete Next Action

1 result(s) found...

Setup Next Action		
	Edit	Next Action
☐		Generate purchase order

Add Order Status
Delete Order Status

5 result(s) found...

Setup Order Status		
	Edit	Order Status
☐		In progress
☐		Completed
☐		Pending
☐		Order Received
☐		Preparing Order
☐		Cancelled

Add Order Method
Delete Order Method

3 result(s) found...

Setup Order Method		
	Edit	Order Method
☐		Email
☐		Web
☐		Mail

The third section on the page is **Setup Order Status**. The **Setup Order Status** section is shown in isolation for the remainder of this manual subsection.

Click the icon in the **Edit** column for the applicable record.

6 result(s) found...

Add Order Status Delete Order Status

	Edit	Order Status
☐		In progress
☐		Completed
☐		Pending
☐		Order Received
☐		Preparing Order
☐		Cancelled

The **Setup Order Status** page opens. Make desired changes to **Order Status** and click the **Save Order Status** button.

My Workspaces Vivarium **Setup Order Status** Back

Save Order Status

*Order Status : Pending for Payment Receipt

The record is revised in the **Setup Order Status** section of the **Setup Material Order List** page.

6 result(s) found...

Add Order Status Delete Order Status

	Edit	Order Status
☐		In progress
☐		Completed
☐		Pending for Payment Receipt
☐		Order Received
☐		Preparing Order
☐		Cancelled

Delete Material Order Status

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order List** link.

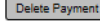
My Workspaces  Vivarium **Board Administration**

System Setup | **List Maintenance Setup** | **Clean-up**

- Setup Pricing Level
- Setup Order Status
- Setup Order Numbering
- Setup Ticket Numbering
- Setup Material Order List 
- Setup Material Order Item List
- Setup Transfer Numbering
- Setup Wean Numbering
- Setup Facilities/Buildings/Floors/Room

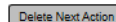
The **Setup Material Order List** page opens.

My Workspaces  Vivarium **Setup Material Order List**  Back

 Add Payment 

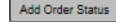
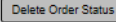
4 result(s) found...

Setup Payment Options		
	Edit	Payment
☐		Credit
☐		Cash
☐		Debit
☐		Purchase Order, External

 Add Next Action 

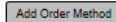
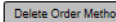
1 result(s) found...

Setup Next Action		
	Edit	Next Action
☐		Generate purchase order

 Add Order Status 

6 result(s) found...

Setup Order Status		
	Edit	Order Status
☐		In progress
☐		Completed
☐		Pending for Payment Receipt
☐		Order Received
☐		Preparing Order
☐		Cancelled

 Add Order Method 

3 result(s) found...

Setup Order Method		
	Edit	Order Method
☐		Email
☐		Web
☐		Mail

The third section on the page is **Setup Order Status**. The **Setup Order Status** section is shown in isolation for the remainder of this manual subsection.

Select the checkbox(es) in the far-left column for the record(s) to be deleted, then click the **Delete Order Status** button.

6 result(s) found...

Add Order Status Delete Order Status

	Edit	Order Status
☐		In progress
☐		Completed
☒		Pending for Payment Receipt
☐		Order Received
☐		Preparing Order
☐		Cancelled

A confirmation popup window displays.

Approved for Ordering

Confirm the Deletion.

Are you sure you want to delete?

CONFIRM CANCEL

Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The record is deleted in the **Setup Order Status** section of the **Setup Material Order List** page.

5 result(s) found...

[Add Order Status](#) [Delete Order Status](#)

Setup Order Status		
	 Edit	Order Status
☐		In progress
☐		Completed
☐		Order Received
☐		Preparing Order
☐		Cancelled

Setup Material Order Method

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order List** link.

My Workspaces  Vivarium **Board Administration**

System Setup | List Maintenance Setup | Clean-up

- Setup Pricing Level
- Setup Order Status
- Setup Order Numbering
- Setup Ticket Numbering
- Setup Material Order List 
- Setup Material Order Item List
- Setup Transfer Numbering
- Setup Wean Numbering
- Setup Facilities/Buildings/Floors/Room

The **Setup Material Order List** page opens.

My Workspaces Vivarium **Setup Material Order List** Back

4 result(s) found...

Setup Payment Options		
	Edit	Payment
☐		Credit
☐		Cash
☐		Debit
☐		Purchase Order, External

1 result(s) found...

Setup Next Action		
	Edit	Next Action
☐		Generate purchase order

5 result(s) found...

Setup Order Status		
	Edit	Order Status
☐		In progress
☐		Completed
☐		Order Received
☐		Preparing Order
☐		Cancelled

3 result(s) found...

Setup Order Method		
	Edit	Order Method
☐		Email
☐		Web
☐		Mail

The fourth section on the page is **Setup Order Method**.

Add Material Order Method

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order List** link.

My Workspaces Vivarium **Board Administration**

System Setup | List Maintenance Setup | Clean-up

- Setup Pricing Level
- Setup Order Status
- Setup Order Numbering
- Setup Ticket Numbering
- Setup Material Order List
- Setup Material Order Item List
- Setup Transfer Numbering
- Setup Wean Numbering
- Setup Facilities / Buildings / Floors / Room

The **Setup Material Order List** page opens.

My Workspaces ▾ Vivarium **Setup Material Order List** [Back](#)

[Add Payment](#) [Delete Payment](#)

4 result(s) found...

Setup Payment Options		
	Edit	Payment
☐		Credit
☐		Cash
☐		Debit
☐		Purchase Order, External

[Add Next Action](#) [Delete Next Action](#)

1 result(s) found...

Setup Next Action		
	Edit	Next Action
☐		Generate purchase order

[Add Order Status](#) [Delete Order Status](#)

5 result(s) found...

Setup Order Status		
	Edit	Order Status
☐		In progress
☐		Completed
☐		Order Received
☐		Preparing Order
☐		Cancelled

[Add Order Method](#) [Delete Order Method](#)

3 result(s) found...

Setup Order Method		
	Edit	Order Method
☐		Email
☐		Web
☐		Mail

The fourth section on the page is **Setup Order Method**. The **Setup Order Method** section is shown in isolation for the remainder of this manual subsection.

Click the **Add Order Method** button.

[Add Order Method](#) [Delete Order Method](#)

3 result(s) found...

Setup Order Method		
	Edit	Order Method
☐		Email
☐		Web
☐		Mail

The **Setup Order Method** page opens. Enter an **Order Method** and click the **Save Order Method** button.

My Workspaces  Vivarium **Setup Order Method**  Back

Save Order Method

*Order Method :

The record is added in the **Setup Order Method** section of the **Setup Material Order List** page.

 Add Order Method  Delete Order Method

4 result(s) found...

Setup Order Method		
	 Edit	Order Method
☐		Email
☐		Web
☐		Mail
☐		Phone

Edit Material Order Method

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order List** link.

My Workspaces  Vivarium **Board Administration**

System Setup **List Maintenance Setup** **Clean-up**

-  Setup Pricing Level
-  Setup Order Status
-  Setup Order Numbering
-  Setup Ticket Numbering
-  Setup Material Order List 
-  Setup Material Order Item List
-  Setup Transfer Numbering
-  Setup Wean Numbering
-  Setup Facilities/Buildings/Floors/Room

The **Setup Material Order List** page opens.

My Workspaces
Vivarium
Setup Material Order List
Back

Add Payment
Delete Payment

4 result(s) found...

	Edit	Payment
☐		Credit
☐		Cash
☐		Debit
☐		Purchase Order, External

Add Next Action
Delete Next Action

1 result(s) found...

	Edit	Next Action
☐		Generate purchase order

Add Order Status
Delete Order Status

5 result(s) found...

	Edit	Order Status
☐		In progress
☐		Completed
☐		Order Received
☐		Preparing Order
☐		Cancelled

Add Order Method
Delete Order Method

3 result(s) found...

	Edit	Order Method
☐		Email
☐		Web
☐		Mail

The fourth section on the page is **Setup Order Method**. The **Setup Order Method** section is shown in isolation for the remainder of this manual subsection.

Click the icon in the **Edit** column for the applicable record.

Add Order Method Delete Order Method

4 result(s) found...

Setup Order Method	
 Edit	Order Method
☐ 	Email
☐ 	Web
☐ 	Mail
☐ 	Phone

The **Setup Order Method** page opens. Make desired changes to **Order Method** and click the **Save Order Method** button.

My Workspaces 

Vivarium

Setup Order Method  Back

Save Order Method

*Order Method :

Website

The record is revised in the **Setup Order Method** section of the **Setup Material Order List** page.

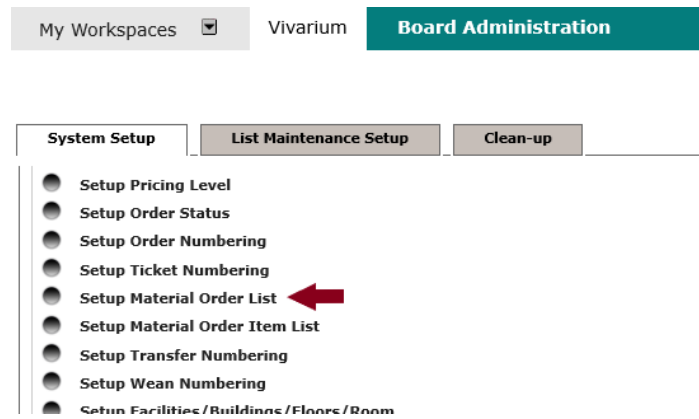
Add Order Method Delete Order Method

4 result(s) found...

Setup Order Method	
 Edit	Order Method
☐ 	Email
☐ 	Website
☐ 	Mail
☐ 	Phone

Delete Material Order Method

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order List** link.



The **Setup Material Order List** page opens.

My Workspaces ▾

Vivarium

Setup Material Order List

Back

Add Payment

Delete Payment

4 result(s) found...

		Payment
☐		Credit
☐		Cash
☐		Debit
☐		Purchase Order, External

Add Next Action

Delete Next Action

1 result(s) found...

		Next Action
☐		Generate purchase order

Add Order Status

Delete Order Status

5 result(s) found...

		Order Status
☐		In progress
☐		Completed
☐		Order Received
☐		Preparing Order
☐		Cancelled

Add Order Method

Delete Order Method

4 result(s) found...

		Order Method
☐		Email
☐		Website
☐		Mail
☐		Phone

The fourth section on the page is **Setup Order Method**. The **Setup Order Method** section is shown in isolation for the remainder of this manual subsection.

4 result(s) found...

Add Order Method Delete Order Method

Setup Order Method		
	Edit	Order Method
☐		Email
☐		Website
☐		Mail
☒		Phone

Select the checkbox(es) in the far-left column for the record(s) to be deleted, then click the **Delete Order Method** button. A confirmation popup window displays.

Approved for Ordering

Confirm the Deletion.

Are you sure you want to delete?

CONFIRM CANCEL

Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The record is deleted in the **Setup Order Method** section of the **Setup Material Order List** page.

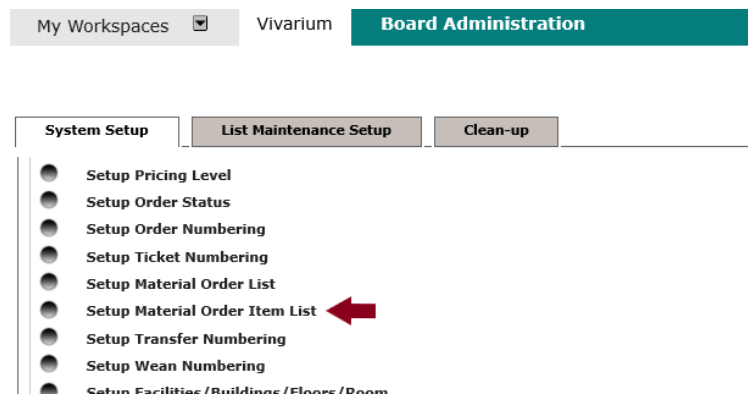
3 result(s) found...

Add Order Method Delete Order Method

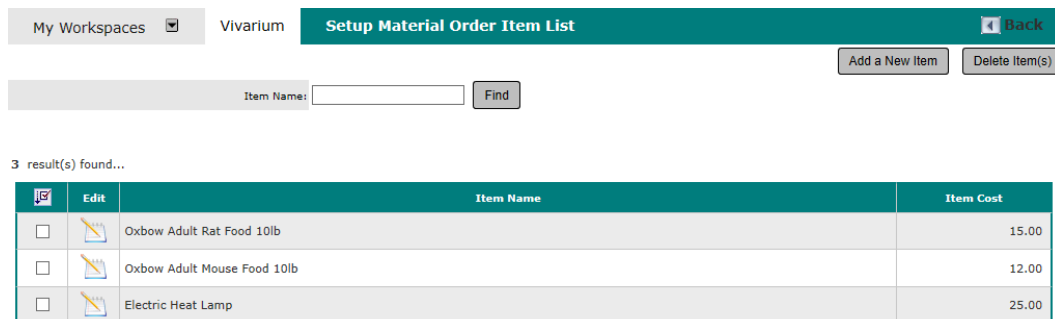
Setup Order Method		
	Edit	Order Method
☐		Email
☐		Website
☐		Mail

Setup Material Order Item List

The **Setup Material Order Item List** page is where a list of regularly ordered supplies and materials is configured. To view the material order item list setup page, navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order Item List** link.

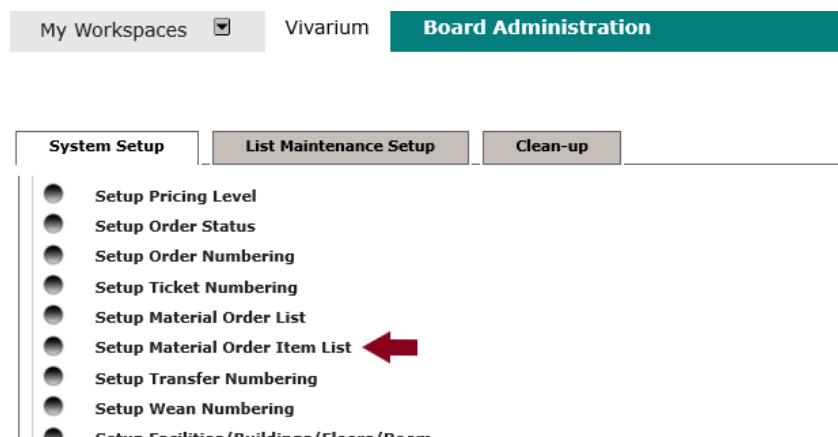


The **Setup Material Order Item List** page opens.



Edit Material Order Item

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order Item List** link.



The **Setup Material Order Item List** page opens. Click the icon in the **Edit** column for the applicable record.

My Workspaces ☒ Vivarium **Setup Material Order Item List** [Back](#)

[Add a New Item](#) [Delete Item\(s\)](#)

Item Name: [Find](#)

3 result(s) found...

	Edit	Item Name	Item Cost
☐		Oxbow Adult Rat Food 10lb	15.00
☐		Oxbow Adult Mouse Food 10lb	12.00
☐		Electric Heat Lamp	25.00

The record is opened in an edit panel.

My Workspaces ☒ Vivarium **Setup Material Order Item List** [Back](#)

[Save Item](#)

*Item Name:

*Item Cost:

Make desired changes to **Item Name** and **Item Cost**, then click the **Save Item** button to save changes and close the edit panel. The record is revised on the **Setup Material Order Item List** page.

My Workspaces ☒ Vivarium **Setup Material Order Item List** [Back](#)

[Add a New Item](#) [Delete Item\(s\)](#)

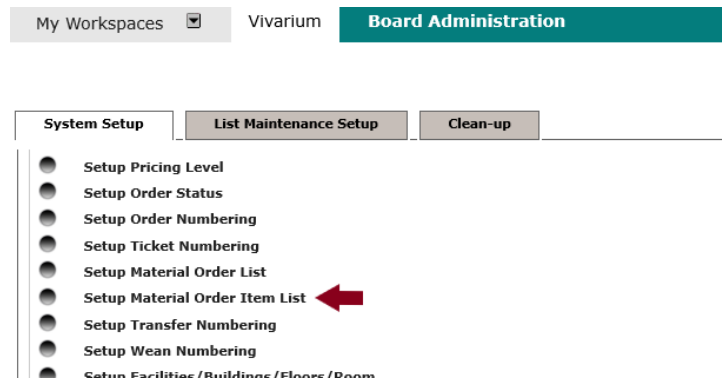
Item Name: [Find](#)

3 result(s) found...

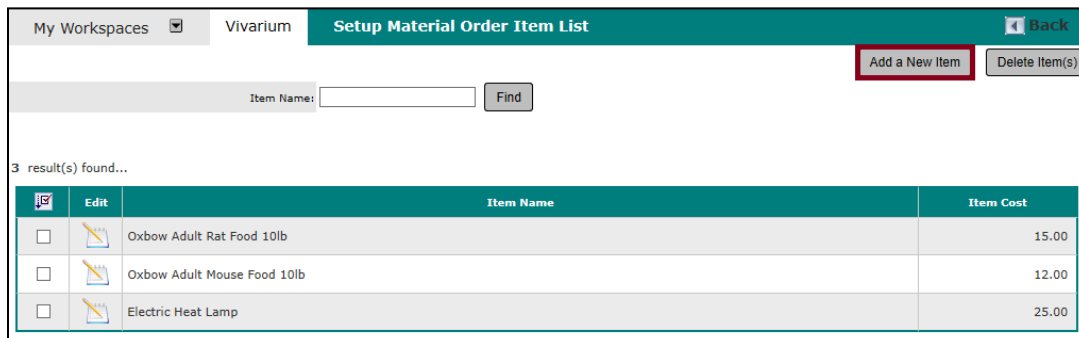
	Edit	Item Name	Item Cost
☐		Oxbow Adult Rat Food 10lb	15.00
☐		Oxbow Adult Mouse Food 10lb	15.00
☐		Electric Heat Lamp	25.00

Add Material Order Item

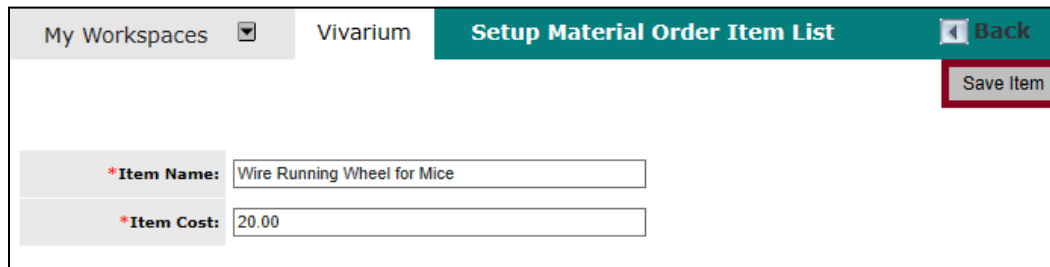
Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order Item List** link.



The **Setup Material Order Item List** page opens. Click the **Add a New Item** button.



An add panel opens for creation of the new record.



Enter desired **Item Name** and **Item Cost**, then click the **Save Item** button to save the record and close the add panel. The record is added on the **Setup Material Order Item List** page.

My Workspaces ☒ Vivarium **Setup Material Order Item List** [Back](#)

[Add a New Item](#) [Delete Item\(s\)](#)

Item Name: [Find](#)

4 result(s) found...

☐	Edit	Item Name	Item Cost
☐		Oxbow Adult Rat Food 10lb	15.00
☐		Oxbow Adult Mouse Food 10lb	15.00
☐		Electric Heat Lamp	25.00
☐		Wire Running Wheel for Mice	20.00

Delete Material Order Item

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Material Order Item List** link.

My Workspaces ☒ Vivarium **Board Administration**

System Setup **List Maintenance Setup** **Clean-up**

- Setup Pricing Level
- Setup Order Status
- Setup Order Numbering
- Setup Ticket Numbering
- Setup Material Order List
- **Setup Material Order Item List**
- Setup Transfer Numbering
- Setup Wean Numbering
- Setup Facilities / Buildings / Floors / Rooms

The **Setup Material Order Item List** page opens. Select the checkbox(es) in the far-left column for the record(s) to be deleted and click the **Delete Item(s)** button.

My Workspaces ☒ Vivarium **Setup Material Order Item List** [Back](#)

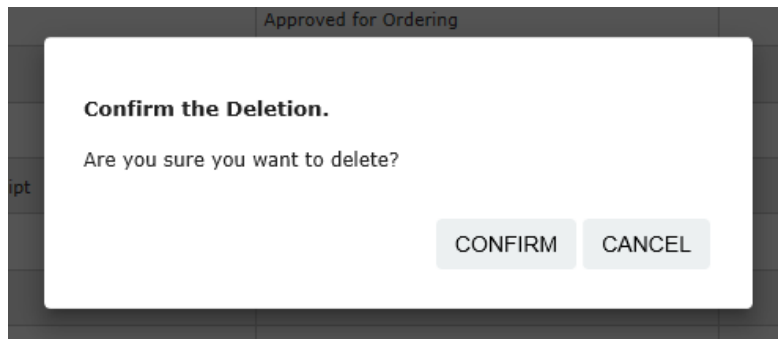
[Add a New Item](#) [Delete Item\(s\)](#)

Item Name: [Find](#)

3 result(s) found...

☐	Edit	Item Name	Item Cost
☐		Oxbow Adult Rat Food 10lb	15.00
☐		Oxbow Adult Mouse Food 10lb	15.00
☒		Electric Heat Lamp	25.00

A confirmation popup window displays.



Click **CANCEL** to return to the **Setup Material Order Item List** page without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The item is deleted on the **Setup Material Order Item List** page.

My Workspaces Vivarium **Setup Material Order Item List** **Back**

Add a New Item Delete Item(s)

Item Name: Find

2 result(s) found...

	Edit	Item Name	Item Cost
☐		Oxbow Adult Rat Food 10lb	15.00
☐		Oxbow Adult Mouse Food 10lb	15.00

Setup Transfer Order Numbering

iRIS™ provides tools for detailed configuration of research animal subject transfer numbers, enabling inclusion of a boilerplate prefix, calendar year, system generated number, or a combination of all three options in the creation of order numbers.

To view the transfer order numbering setup page, navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Transfer Numbering** link.

My Workspaces ☒ Vivarium **Board Administration**

System Setup **List Maintenance Setup** **Clean-up**

- ☐ Setup Pricing Level
- ☐ Setup Order Status
- ☐ Setup Order Numbering
- ☐ Setup Ticket Numbering
- ☐ Setup Material Order List
- ☐ Setup Material Order Item List
- ☒ Setup Transfer Numbering
- ☐ Setup Wean Numbering
- ☐ Setup Facilities / Buildings / Floors / Rooms

The **Setup Transfer Numbering** page opens.

My Workspaces ☒ Vivarium **Setup Transfer Order Numbering** [Back](#)

[Save Numbering](#)

Use in Number	Description of Number Part	Number Part Information	Separator
☒	Constant Prefix	TRN	
☒	Calendar Year	☐ All 4 digits ☒ Last 2 digits	
☒	System Generated Number	1 ☒ Zero Pad the Sequence Number Number of Digits 3	

As shown in the **Description of Number Part** column in the screenshot above, the order number can be configured to include a **Constant Prefix**, **Calendar Year** and **System Generated Number**. Selecting the checkbox in the **Use in Number** column includes all items in that row in the numbering scheme.

The **System Generated Number** primarily consists of a sequence number which is incremented by one (1) for each new transfer order number generated by the scheme. Options to pad the sequence number with leading zeroes and set a fixed digit count for **System Generated Numbers** are available, as shown in the screenshot above. Fields in the example above are filled as follows.

The **Constant Prefix** is “TRN”.

The first **Separator** field is blank, indicating that there will be no separator character between the **Constant Prefix** and the next field, **Calendar Year**. If desired, a dash or other separator character could be entered here.

The **Last 2 digits** of the current **Calendar Year** are “19”.

The second **Separator** field is blank, indicating that there will be no separator character between the **Calendar Year** and **System Generated Number**. If desired, a dash or other separator character could be entered here.

The first sequence number to be used is “1”, the checkbox for **Zero Pad the Sequence Number** is selected and **Number of Digits** is set to “3”.

The first transfer order number generated by this scheme would be:

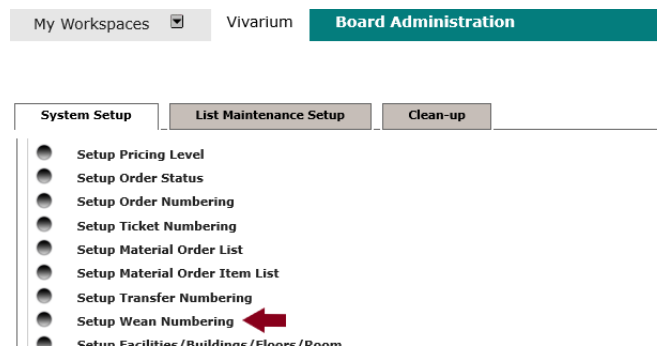
TRN19001

Click the **Save Numbering** button to save the numbering scheme.

Setup Wean Numbering

iRIS™ provides tools for detailed configuration of research animal subject wean numbers, enabling inclusion of a boilerplate prefix, calendar year, system generated number, or a combination of all three options in the creation of wean numbers.

To view the wean numbering setup page, navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Wean Numbering** link.



The **Setup Wean Numbering** page opens.

My Workspaces ☒ Vivarium **Setup Wean Numbering** [Back](#) [Save Numbering](#)

Use in Number	Description of Number Part	Number Part Information	Separator
☒	Constant Prefix	WEAN	-
☒	Calendar Year	☒ All 4 digits ☐ Last 2 digits	-
☒	System Generated Number	1 ☒ Zero Pad the Sequence Number Number of Digits 3	

As shown in the **Description of Number Part** column in the screenshot above, the order number can be configured to include a **Constant Prefix**, **Calendar Year** and **System Generated Number**. Selecting the checkbox in the **Use in Number** column includes all items in that row in the numbering scheme.

The **System Generated Number** primarily consists of a sequence number which is incremented by one (1) for each new wean number generated by the scheme. Options to pad the sequence number with leading zeroes and set a fixed digit count for **System Generated Numbers** are available, as shown in the screenshot above. Fields in the example above are filled as follows.

The **Constant Prefix** is “WEAN”.

The first **Separator** character is “ – ”.

All 4 digits of the current **Calendar Year** are “2019”.

The second **Separator** character is “ – ”.

The first sequence number to be used is “3”, the checkbox for **Zero Pad the Sequence Number** is selected and **Number of Digits** is set to “3”.

The first wean number generated by this scheme would be:

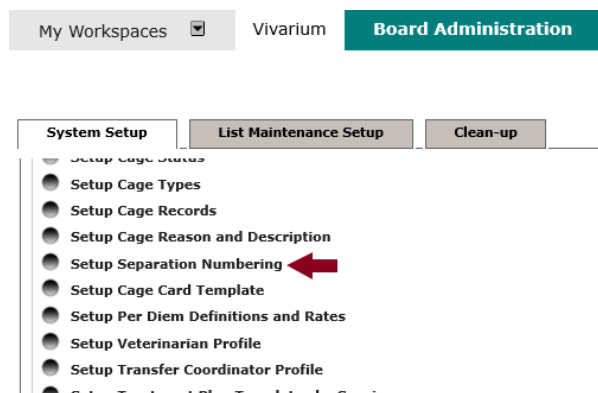
WEAN-2019-003

Click the **Save Numbering** button to save the numbering scheme.

Setup Separation Numbering

iRIS™ provides tools for detailed configuration of research animal subject separation numbers, enabling inclusion of a boilerplate prefix, calendar year, system generated number, or a combination of all three options in the creation of order numbers.

To view the separation numbering setup page, navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Separation Numbering** link.



The **Setup Separation Numbering** page opens.

My Workspaces ☒ Vivarium **Setup Separation Numbering** [Back](#)

[Save Numbering](#)

Use in Number	Description of Number Part	Number Part Information	Separator
☒	Constant Prefix	SEP	-
☒	Calendar Year	☐ All 4 digits ☒ Last 2 digits	-
☒	System Generated Number	1 ☒ Zero Pad the Sequence Number Number of Digits 4	

As shown in the **Description of Number Part** column in the screenshot above, the order number can be configured to include a **Constant Prefix**, **Calendar Year** and **System Generated Number**. Selecting the checkbox in the **Use in Number** column includes all items in that row in the numbering scheme.

The **System Generated Number** primarily consists of a sequence number which is incremented by one (1) for each new separation number generated by the scheme. Options to pad the sequence number with leading zeroes and set a fixed digit count for **System Generated Numbers** are available, as shown in the screenshot above. Fields in the example above are filled as follows.

The **Constant Prefix** is “SEP”.

The first **Separator** character is “-”.

The **Last 2 digits** of the current **Calendar Year** are “19”.

The second **Separator** character is “-”.

The first sequence number to be used is “1”, the checkbox for **Zero Pad the Sequence Number** is selected and **Number of Digits** is set to “4”.

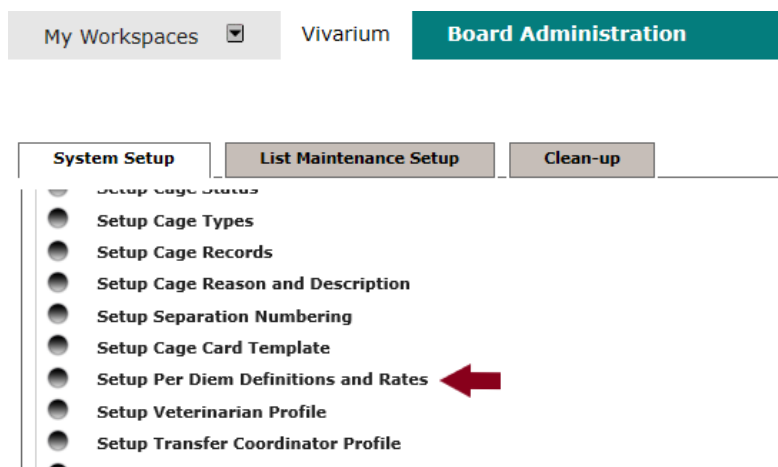
The first separation number generated by this scheme would be:

SEP-19-0001

Click the **Save Numbering** button to save the numbering scheme.

Setup Per Diem Definitions and Rates

Per diem definitions and rates for cages are maintained in the iRIS™ system on the **Setup Per Diem Rate List** page. To access the page, navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Per Diem Definitions and Rates** link.



The **Setup Per Diem Rate List** page opens.

My Workspaces 

Vivarium

Setup Per Diem Rate List  Back

Add a Rate

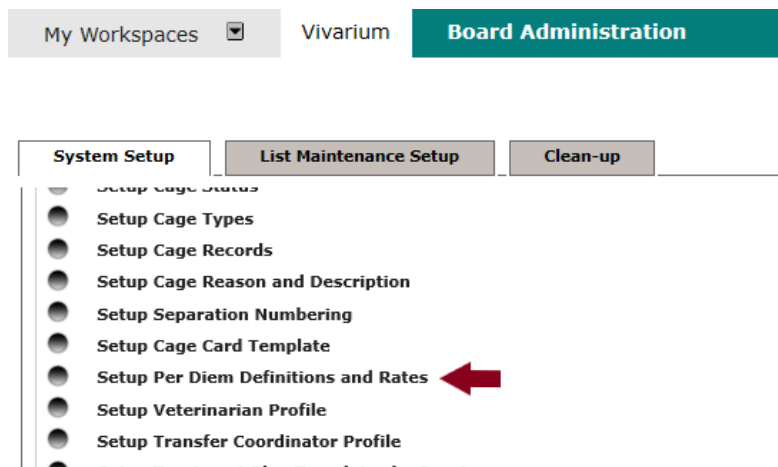
Delete Selected Rate(s)

7 result(s) found...

	Edit 	Cage Type	Description	Per Diem Code	Effective Date	Rate
☐		Bird Cage	Medium narrow gauge bird cage, max occupancy 10	2432	03/07/2019	\$1.50
☐		Canine	Medium canine cage with rest shelf	54454	01/01/2018	\$3.00
☐		Canine small	Small canine holding cage	647863	01/01/2018	\$2.00
☐		Large Goat cage	Large cage with outdoor access	150	12/24/2018	\$3.50
☐		Large Goat cage	Large cage for indoor holding	42434	01/01/2018	\$3.00
☐		Large Mouse Cage	Max occupancy: 25 mice	2230	03/07/2019	\$1.75
☐		Small Pig Cage	Small pig cage with integrated feeder	SC-P001	02/15/2019	\$30.00

Add Per Diem Rate

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Per Diem Definitions and Rates** link.



The **Setup Per Diem Rate List** page opens. Click the **Add a Rate** button.

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Vivarium

Setup Per Diem Rate List

 Back

Add a Rate

Delete Selected Rate(s)

7 result(s) found...

	Edit	Cage Type	Description	Per Diem Code	Effective Date	Rate
☐		Bird Cage	Medium narrow gauge bird cage, max occupancy 10	2432	03/07/2019	\$1.50
☐		Canine	Medium canine cage with rest shelf	54454	01/01/2018	\$3.00
☐		Canine small	Small canine holding cage	647863	01/01/2018	\$2.00
☐		Large Goat cage	Large cage with outdoor access	150	12/24/2018	\$3.50
☐		Large Goat cage	Large cage for indoor holding	42434	01/01/2018	\$3.00
☐		Large Mouse Cage	Max occupancy: 25 mice	2230	03/07/2019	\$1.75
☐		Small Pig Cage	Small pig cage with integrated feeder	SC-P001	02/15/2019	\$30.00

An add panel opens for creation of the new record.

My Workspaces		Vivarium	Setup Per Diem Rate List				Back			
			Add a new Rate Details		Save Per Diem Rate					
		*Cage Type:	--none--							
		*Per Diem Code:								
		*Description:								
		Comments:								
Delete	Effective Date	Ending Date	Rate							
			\$							

Click in the **Cage Type** field and select an item from the dropdown list.

My Workspaces ☒ Vivarium **Setup Per Diem Rate List** [Back](#)

[Add a new Rate Details](#) [Save Per Diem Rate](#)

*Cage Type:

*Per Diem Code:

*Description:

Comments:

Delete	*Effective Date	Ending Date	*Rate
☒			\$

Enter desired **Per Diem Code**, **Description** and **Comments**.

My Workspaces ☒ Vivarium **Setup Per Diem Rate List** [Back](#)

[Add a new Rate Details](#) [Save Per Diem Rate](#)

*Cage Type:

*Per Diem Code:

*Description:

Comments:

Delete	Effective Date	Select date	Ending Date	*Rate
☒				\$

Manually enter an **Effective Date** or click on the calendar button to open a calendar widget. If using the widget, navigate to the desired date and click it to select.

Enter the desired **Rate** for the selected **Effective Date**.

My Workspaces ▾ Vivarium **Setup Per Diem Rate List** [Back](#)

[Add a new Rate Details](#) [Save Per Diem Rate](#)

*Cage Type: Type A (Small) ▾

*Per Diem Code: 68-975

*Description: Small rodent transfer cage

Comments: Cage for transfer of mice, rats or guinea pigs. Max occupancy 5 mice, 2 rats, 1 guinea pig.

Delete	Effective Date	Ending Date	Rate
	10/31/2019		\$0.75

If the **Rate** is to be changed on a known, future date, click the **Add a new Rate Details** button to open a new rate form.

My Workspaces ▾ Vivarium **Setup Per Diem Rate List** [Back](#)

[Add a new Rate Details](#) [Save Per Diem Rate](#)

*Cage Type: Type A (Small) ▾

*Per Diem Code: 68-975

*Description: Small rodent transfer cage

Comments: Cage for transfer of mice, rats or guinea pigs. Max occupancy 5 mice, 2 rats, 1 guinea pig.

Delete	Effective Date	Ending Date	Rate
	10/31/2019		\$0.75
	01/01/2020		\$1.00

Enter an **Effective Date** and **Rate**, then click the **Save Per Diem Rate** button to save the record. The **Ending Date** for the prior entry in the list is automatically populated by the system, set to the day before the **Effective Date** of the new rate.

My Workspaces ▾ Vivarium **Setup Per Diem Rate List** [Back](#)

[Add a new Rate Details](#) [Save Per Diem Rate](#)

*Cage Type: Type A (Small) ▾

*Per Diem Code: 68-975

*Description: Small rodent transfer cage

Comments: Cage for transfer of mice, rats or guinea pigs. Max occupancy 5 mice, 2 rats, 1 guinea pig.

Delete	Effective Date	Ending Date	Rate
	10/31/2019	12/31/2019	\$0.75
	01/01/2020		\$1.00

The add panel remains open for entry of additional per diem rates. Click the **Back** button at the upper right corner of the page to close the add panel. The new record is added on the **Setup Per Diem Rate List** page, where the most recent, or upcoming, **Rate** is shown.

My Workspaces

Vivarium

Setup Per Diem Rate List

Back

Add a Rate

Delete Selected Rate(s)

8 result(s) found...

☒	Edit	Cage Type	Description	Per Diem Code	Effective Date	Rate
☐		Bird Cage	Medium narrow gauge bird cage, max occupancy 10	2432	03/07/2019	\$1.50
☐		Canine	Medium canine cage with rest shelf	54454	01/01/2018	\$3.00
☐		Canine small	Small canine holding cage	647863	01/01/2018	\$2.00
☐		Large Goat cage	Large cage with outdoor access	150	12/24/2018	\$3.50
☐		Large Goat cage	Large cage for indoor holding	42434	01/01/2018	\$3.00
☐		Large Mouse Cage	Max occupancy: 25 mice	2230	03/07/2019	\$1.75
☐		Small Pig Cage	Small pig cage with integrated feeder	SC-P001	02/15/2019	\$30.00
☐		Type A (Small)	Small rodent transfer cage	68-975	01/01/2020	\$1.00

Edit Per Diem Rate

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Per Diem Definitions and Rates** link.

The screenshot shows the 'Board Administration' section of the software. Under the 'System Setup' tab, a list of setup options is displayed. A red arrow points to the option 'Setup Per Diem Definitions and Rates'.

System Setup	List Maintenance Setup	Clean-up
- Setup Cage Status - Setup Cage Types - Setup Cage Records - Setup Cage Reason and Description - Setup Separation Numbering - Setup Cage Card Template - Setup Per Diem Definitions and Rates - Setup Veterinarian Profile - Setup Transfer Coordinator Profile		

The **Setup Per Diem Rate List** page opens. Click the icon in the **Edit** column for the applicable record.

My Workspaces	Vivarium	Setup Per Diem Rate List	Back			
		Add a Rate	Delete Selected Rate(s)			
8 result(s) found...						
	Edit	Cage Type	Description	Per Diem Code	Effective Date	Rate
☐		Bird Cage	Medium narrow gauge bird cage, max occupancy 10	2432	03/07/2019	\$1.50
☐		Canine	Medium canine cage with rest shelf	54454	01/01/2018	\$3.00
☐		Canine small	Small canine holding cage	647863	01/01/2018	\$2.00
☐		Large Goat cage	Large cage with outdoor access	150	12/24/2018	\$3.50
☐		Large Goat cage	Large cage for indoor holding	42434	01/01/2018	\$3.00
☐		Large Mouse Cage	Max occupancy: 25 mice	2230	03/07/2019	\$1.75
☐		Small Pig Cage	Small pig cage with integrated feeder	SC-P001	02/15/2019	\$30.00
☐		Type A (Small)	Small rodent transfer cage	68-975	01/01/2020	\$1.00

The record is opened in an edit panel.

My Workspaces
Vivarium
Setup Per Diem Rate List
Back

Add a new Rate Details
Save Per Diem Rate

* Cage Type: Canine small
* Per Diem Code: 647863
* Description: Small canine holding cage
Comments: Cage is for brief holding purposes only, animal must be returned to indoor/outdoor ward promptly

Delete	Effective Date	Ending Date	*Rate
	01/01/2018		\$2.00

Make desired changes to the **Cage Type**, **Per Diem Code**, **Description** and **Comments** fields.

Rate Line Item Changes

If the **Effective Date** or **Rate** previously entered for a line item in the rate table is incorrect, enter revisions directly into those fields.

If the existing **Effective Date** and **Rate** are correct, but the **Rate** is to be changed on some known, future date, click the **Add a new Rate Details** button to open a new rate line item.

My Workspaces
Vivarium
Setup Per Diem Rate List
Back

Add a new Rate Details
Save Per Diem Rate

* Cage Type: Canine small
* Per Diem Code: 647863
* Description: Small canine holding cage
Comments: Cage is for brief holding purposes only, animal must be returned to indoor/outdoor ward promptly

Delete	Effective Date	Ending Date	*Rate
	01/01/2018		\$2.00
	11/01/2019		\$2.25

Enter the desired **Rate**.

Manually enter an **Effective Date** or click on the calendar button to open a calendar widget. If using the widget, navigate to the desired date and click it to select.

Click the **Save Per Diem Rate** button.

My Workspaces Vivarium **Setup Per Diem Rate List** Back

*Cage Type: Canine small
 *Per Diem Code: 647863
 *Description: Small canine holding cage
 Comments: Cage is for brief holding purposes only, animal must be returned to indoor/outdoor ward promptly

Delete	*Effective Date	Ending Date	*Rate
	01/01/2018	10/31/2019	\$2.00
	11/01/2019		\$2.25

The **Ending Date** for the prior entry in the list is automatically populated by the system, set to the day before the **Effective Date** of the new rate.

The edit panel remains open for entry of additional per diem rates. Click the **Back** button at the upper right corner of the page to close the edit panel. The record is revised on the **Setup Per Diem Rate List** page, where the most recent, or upcoming, **Rate** is shown.

My Workspaces Vivarium **Setup Per Diem Rate List** Back

8 result(s) found...

	Edit	Cage Type	Description	Per Diem Code	Effective Date	Rate
☐		Bird Cage	Medium narrow gauge bird cage, max occupancy 10	2432	03/07/2019	\$1.50
☐		Canine	Medium canine cage with rest shelf	54454	01/01/2018	\$3.00
☐		Canine small	Small canine holding cage	647863	11/01/2019	\$2.25
☐		Large Goat cage	Large cage with outdoor access	150	12/24/2018	\$3.50
☐		Large Goat cage	Large cage for indoor holding	42434	01/01/2018	\$3.00
☐		Large Mouse Cage	Max occupancy: 25 mice	2230	03/07/2019	\$1.75
☐		Small Pig Cage	Small pig cage with integrated feeder	SC-P001	02/15/2019	\$30.00
☐		Type A (Small)	Small rodent transfer cage	68-975	01/01/2020	\$1.00

Rate Line Item Deletions

Because line items in the rate table on the **Setup Per Diem Rate List** edit panel can be revised, it is not usually necessary to delete any of those line items. It is especially important not to delete line items if the institution wishes to maintain a historical record of rates. However, rate line items can be deleted.

Click the icon in the **Delete** column for the line item to be deleted.

My Workspaces
Vivarium
Setup Per Diem Rate List
Back

Add a new Rate Details
Save Per Diem Rate

*Cage Type:

Canine small

*Per Diem Code:

647863

*Description:

Small canine holding cage

Comments:

Cage is for brief holding purposes only, animal must be returned to indoor/outdoor ward promptly

Delete	Effective Date	Ending Date	Rate
	01/01/2018	10/31/2019	\$2.00
	11/01/2019		\$2.25

A confirmation popup dialog opens.

This site says...

Confirm the Deletion.
Are you sure you want to delete?

OK
Cancel

Click **Cancel** to close the popup without saving changes.

Click **OK** to save changes and close the popup. The rate line item is deleted.

My Workspaces
Vivarium
Setup Per Diem Rate List
Back

Add a new Rate Details
Save Per Diem Rate

*Cage Type:

Canine small

*Per Diem Code:

647863

*Description:

Small canine holding cage

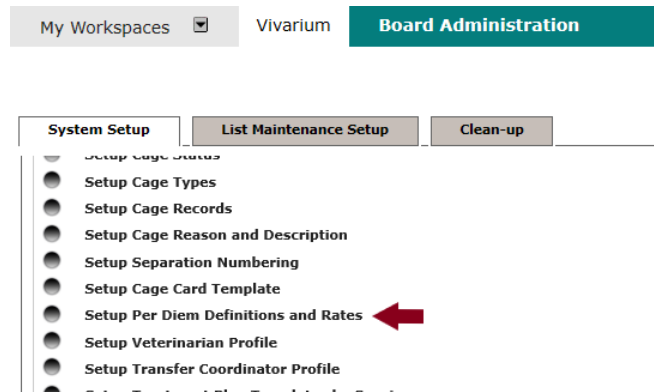
Comments:

Cage is for brief holding purposes only, animal must be returned to indoor/outdoor ward promptly

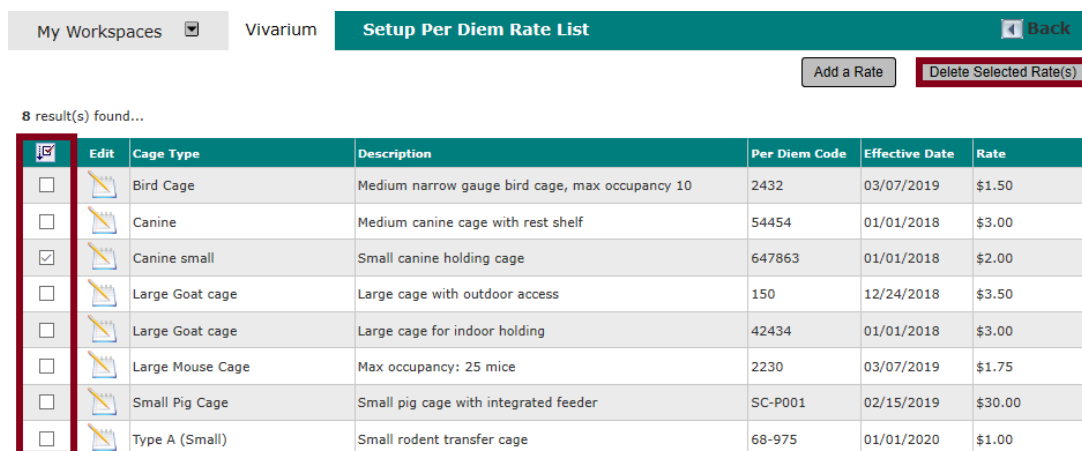
Delete	Effective Date	Ending Date	Rate
	01/01/2018		\$2.00

Delete Per Diem Rate

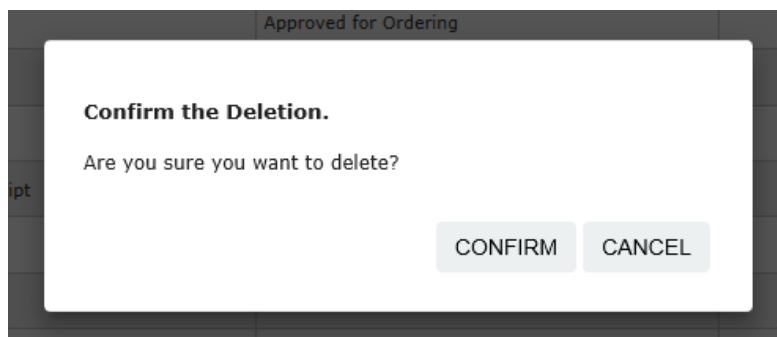
Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Per Diem Definitions and Rates** link.



The **Setup Per Diem Rate List** page opens. Select the checkbox(es) in the far-left column for the applicable record(s) and click the **Delete Selected Rate(s)** button.



A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The record is deleted on the **Setup Per Diem Rate List** page.

My Workspaces

Vivarium

Setup Per Diem Rate List Back

Add a Rate

Delete Selected Rate(s)

7 result(s) found...

	Edit	Cage Type	Description	Per Diem Code	Effective Date	Rate
☐		Bird Cage	Medium narrow gauge bird cage, max occupancy 10	2432	03/07/2019	\$1.50
☐		Canine	Medium canine cage with rest shelf	54454	01/01/2018	\$3.00
☐		Large Goat cage	Large cage with outdoor access	150	12/24/2018	\$3.50
☐		Large Goat cage	Large cage for indoor holding	42434	01/01/2018	\$3.00
☐		Large Mouse Cage	Max occupancy: 25 mice	2230	03/07/2019	\$1.75
☐		Small Pig Cage	Small pig cage with integrated feeder	SC-P001	02/15/2019	\$30.00
☐		Type A (Small)	Small rodent transfer cage	68-975	01/01/2020	\$1.00

Setup Charge Master

The ARC Charge Master provides a central listing of subject animal expense accounts. The account lists are maintained in the iRIS™ system on the **Setup Charge Master** page. To access the page, navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Charge Master** link.

My Workspaces

Vivarium

Board Administration

System Setup

List Maintenance Setup

Clean-up

Setup Cage Card Template

Setup Per Diem Definitions and Rates

Setup Veterinarian Profile

Setup Transfer Coordinator Profile

Setup Treatment Plan Templates by Species

Setup Charge Master

Setup Generation

Setup Life Status

The **Setup Charge Master** page opens.

My Workspaces 

Vivarium

Setup Charge Master  Back

View	Charge Master
	Charge Ticket

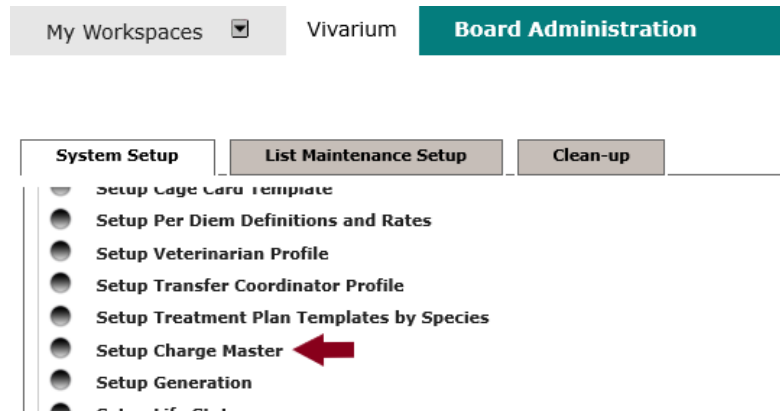
View	Charge Master
	Animal Orders

Two types of accounts are listed. **Charge Ticket** accounts are for expense items other than subject animal orders. **Animal Orders** accounts are for subject animal order expense.

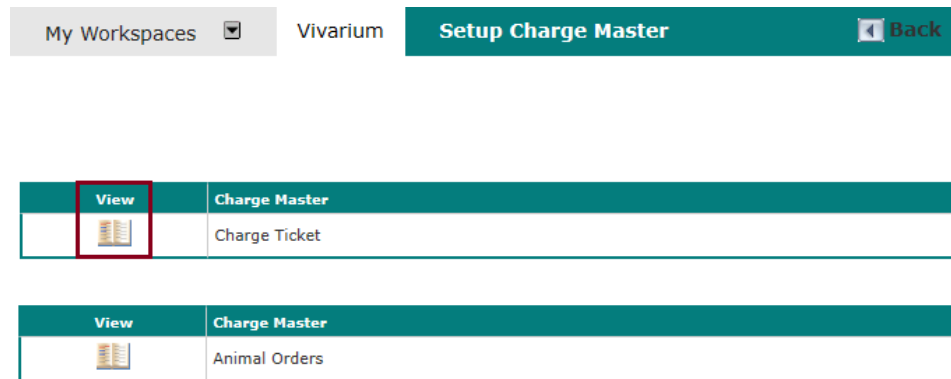
Note that the two items listed above are hard coded and cannot be edited or deleted.

Charge Ticket Configuration

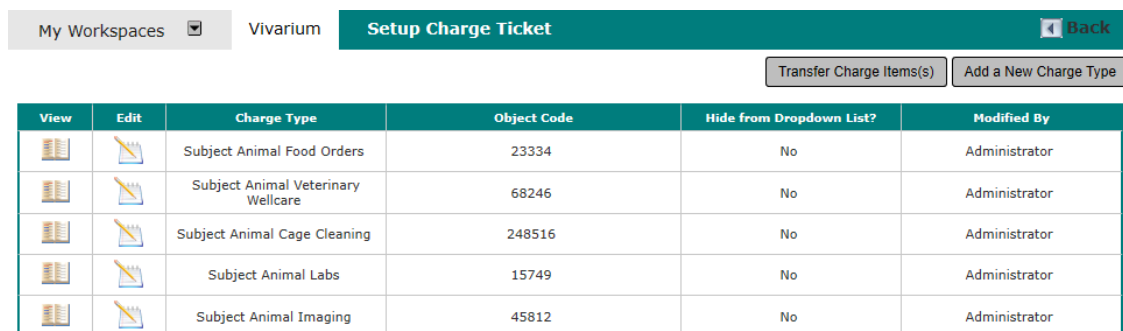
Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Charge Master** link.



The **Setup Charge Master** page opens. Click the icon in the **View** column for **Charge Ticket**.



The **Setup Charge Ticket** page opens.



Add Non-Animal Charge Type

On the **Setup Charge Master** page, click the icon in the **View** column for **Charge Ticket**.



View	Charge Master
	Charge Ticket

View	Charge Master
	Animal Orders

The **Setup Charge Ticket** page opens. Click the **Add a New Charge Type** button.

My Workspaces		Vivarium	Setup Charge Ticket	Back	
				Transfer Charge Items(s)	Add a New Charge Type
View	Edit	Charge Type	Object Code	Hide from Dropdown List?	Modified By
		Subject Animal Food Orders	23334	No	Administrator
		Subject Animal Veterinary Wellcare	68246	No	Administrator
		Subject Animal Cage Cleaning	248516	No	Administrator
		Subject Animal Labs	15749	No	Administrator
		Subject Animal Imaging	45812	No	Administrator

The **Charge Type** popup dialog box opens for creation of the new record.

Charge Type: X

*Charge Type: Subject Animal Urinalysis

*Object Code: 68514

*Hide From DropDown? ☐ Yes ☒ No

Cancel

Save Charge Type

Enter the desired **Charge Type** name and **Object Code**.

Select “Yes” or “No” for **Hide from DropDown?** A selection of “No” means this charge type will be visible and available for selection everywhere in iRIS™ where the charge type list appears. A selection of “Yes” means this charge type will not be visible or available for selection in the charge type list.

Click **Cancel** to close the popup without saving the record.

Click **Save Charge Type** to save the record and close the popup. The record is added on the **Setup Charge Ticket** page.

My Workspaces 

Vivarium

Setup Charge Ticket

 Back

Transfer Charge Items(s)

Add a New Charge Type

View	Edit	Charge Type	Object Code	Hide from Dropdown List?	Modified By
		Subject Animal Food Orders	23334	No	Administrator
		Subject Animal Veterinary Wellcare	68246	No	Administrator
		Subject Animal Cage Cleaning	248516	No	Administrator
		Subject Animal Labs	15749	No	Administrator
		Subject Animal Imaging	45812	No	Administrator
		Subject Animal Urinalysis	68514	No	Administrator

Edit Non-Animal Charge Type

On the **Setup Charge Master** page, click the icon in the **View** column for **Charge Ticket**.

My Workspaces 

Vivarium

Setup Charge Master  Back

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The **Setup Charge Ticket** page opens. Click the icon in the **Edit** column for the applicable record.

My Workspaces

Vivarium

Setup Charge Ticket

Back

Transfer Charge Item(s)

Add a New Charge Type

View	Edit	Charge Type	Object Code	Hide from Dropdown List?	Modified By
		Subject Animal Food Orders	23334	No	Administrator
		Subject Animal Veterinary Wellcare	68246	No	Administrator
		Subject Animal Cage Cleaning	248516	No	Administrator
		Subject Animal Labs	15749	No	Administrator
		Subject Animal Imaging	45812	No	Administrator
		Subject Animal Urinalysis	68514	No	Administrator

The record is opened for editing in a **Charge Type** popup dialog box.

Charge Type: X

*Charge Type:

*Object Code:

*Hide From DropDown? ☐ Yes ☒ No

Cancel

Save Charge Type

Make desired changes in the popup.

*Note that a selection of “No” for **Hide from DropDown?** means this charge type will be visible and available for selection everywhere in iRIS™ where the Charge Type list appears. A selection of “Yes” means this charge type will not be visible or available for selection in the charge type list.*

Click **Cancel** to close the popup without saving changes.

Click **Save Charge Type** to save the record and close the popup. The record is revised on the **Setup Charge Ticket** page.

My Workspaces ▼		Vivarium Setup Charge Ticket Back			
		Transfer Charge Item(s) Add a New Charge Type			
View	Edit	Charge Type	Object Code	Hide from Dropdown List?	Modified By
		Subject Animal Food Orders	23334	No	Administrator
		Subject Animal Veterinary Wellcare	68246	No	Administrator
		Subject Animal Cage Cleaning	248516	No	Administrator
		Subject Animal Labs	15749	No	Administrator
		Subject Animal Imaging	45812	No	Administrator
		Subject Animal Urine Dipstick	68514	No	Administrator

Delete Non-Animal Charge Type

In order to maintain the integrity of **Charge Type** and Charge Item audit trails, in cases where a **Charge Type** is to be deleted any Charge Item(s) assigned to it must be re-assigned to a different **Charge Type** first.

On the **Setup Charge Master** page, click the icon in the **View** column for **Charge Ticket**.

My Workspaces ▼		Vivarium Setup Charge Master Back	
		Charge Master	Charge Ticket
		Charge Master	Animal Orders

The **Setup Charge Ticket** page opens.

My Workspaces

Vivarium

Setup Charge Ticket

Transfer Charge Item(s)

Add a New Charge Type

View	Edit	Charge Type	Object Code	Hide from Dropdown List?	Modified By
		Subject Animal Food Orders	23334	No	Administrator
		Subject Animal Veterinary Wellcare	68246	No	Administrator
		Subject Animal Cage Cleaning	248516	No	Administrator
		Subject Animal Labs	15749	No	Administrator
		Subject Animal Imaging	45812	No	Administrator
		Subject Animal Urine Dipstick	68514	No	Administrator

In this example, the “Subject Animal Imaging” **Charge Type** is to be deleted.

Click the **Transfer Charge Item(s)** button. The **Transfer Charge Items** popup dialog box opens.

The Charge Item list is empty when the popup initially loads.

Click in the **Charge Type From** field to open a dropdown list of previously created **Charge Types**. Select the **Charge Type** to be deleted, then click the **Find** button to load the list of Charge Items assigned to the selected **Charge Type**.

In this example “Subject Animal Imaging” is selected. When the **Find** button is clicked the selected **Charge Type** name populates in the header of the list of Charge Items to confirm the list contains Charge Items assigned to that **Charge Type**.

In this example the list is empty, indicating no Charge Items are assigned to this **Charge Type** and it is safe to delete.

*Note: Any **Charge Items** appearing in this list must be reassigned to a different **Charge Type** before the selected **Charge Type** can be deleted. See the next section of this manual, *Transfer Charge Items*, for transfer instructions.*

Click the **Delete** button. A confirmation popup window displays.

Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The **Charge Type** is deleted on the **Setup Charge Ticket** page.

My Workspaces ☒

Vivarium

Setup Charge Ticket

1 Back

Transfer Charge Item(s)

Add a New Charge Type

View	Edit	Charge Type	Object Code	Hide from Dropdown List?	Modified By
		Subject Animal Food Orders	23334	No	Administrator
		Subject Animal Veterinary Wellcare	68246	No	Administrator
		Subject Animal Cage Cleaning	248516	No	Administrator
		Subject Animal Labs	15749	No	Administrator
		Subject Animal Urine Dipstick	68514	No	Administrator

Non-Animal Charge Items

To manage charge item accounts assigned to a **Charge Type**, click the icon in the **View** column for the applicable **Charge Type**.

My Workspaces		Vivarium	Setup Charge Ticket		
				Transfer Charge Item(s)	Add a New Charge Type
View	Edit	Charge Type	Object Code	Hide from Dropdown List?	Modified By
		Subject Animal Food Orders	23334	No	Administrator
		Subject Animal Veterinary Wellcare	68246	No	Administrator
		Subject Animal Cage Cleaning	248516	No	Administrator
		Subject Animal Labs	15749	No	Administrator
		Subject Animal Imaging	45812	No	Administrator

The **Charge Items** page is opened for the selected **Charge Type**. **Charge Items** are sorted in descending order of **Start Date**.

My Workspaces

Vivarium

Setup Charge Ticket - Charge Items

Apply Rate(s)

Add a New Charge Item

Note: Any changes will apply to charge tickets made after the modification. When editing tickets that fall in the date range of a newly effective change, the updated value will be displayed in the dropdown menu for the charge item.

	Edit	Show History	Charge Item	Start Date	End Date	Cost	Previous Cost	Percent Difference	Hide from Dropdown List?	Modified By	Date Modified
☐			Goat Food	03/07/2019	03/04/2021	21.00	20.00	5.00 %	No	Administrator	03/07/2019
☐			Goat Milk	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Lion Food	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Feeding Service	03/07/2019	03/08/2023	10.30	10.00	3.00 %	No	Administrator	03/07/2019
☐			Pellets	03/01/2019	03/29/2019	15.00	0.00	0.00 %	No	Administrator	03/12/2019

Non-animal charge items can be added, edited, or have markup / markdown rates applied from this page. It is also possible to view charge item change history from this page.

Transfer Charge Items

In cases where a **Charge Item** is assigned to the incorrect **Charge Type**, or where a **Charge Type** is to be deleted, the **Charge Item** can be transferred to a different **Charge Type**.

In this example the “Subject Animal Urine Dipstick” **Charge Type**, shown in the screenshot below, was created in error. A specific lab test like this should have been created as a **Charge Item** assigned to the “Subject Animal Labs” **Charge Type**. This **Charge Type** must be deleted, but it has **Charge Items** assigned to it.

Click the **Transfer Charge Item(s)** button.

My Workspaces		Vivarium	Setup Charge Ticket		
				Transfer Charge Item(s)	Add a New Charge Type
View	Edit	Charge Type	Object Code	Hide from Dropdown List?	Modified By
		Subject Animal Food Orders	23334	No	Administrator
		Subject Animal Veterinary Wellcare	68246	No	Administrator
		Subject Animal Cage Cleaning	248516	No	Administrator
		Subject Animal Labs	15749	No	Administrator
		Subject Animal Imaging	45812	No	Administrator
		Subject Animal Urine Dipstick	68514	No	Administrator

The **Transfer Charge Items** popup dialog box opens.

Transfer Charge Items

Charge Type From: --none-- Find... Charge Type To: --none--

Delete This Charge Type: --none-- Delete

No Charge Items. Please add some Items.

Cancel Make Transfer

The Charge Items list is empty when the popup initially loads. Click in the **Charge Type From** field to open a dropdown list of previously created **Charge Types**.

Transfer Charge Items

Charge Type From: --none-- Find... Charge Type To: --none--

Delete This Charge Type: --none-- Delete

No Charge Items. Please add some Items.

Cancel Make Transfer

Select the **Charge Type** that is to be deleted from the list. In this example, the “Subject Animal Urine Dipstick” Charge Type is selected. Notice that when the **Charge Type** is selected the same **Charge Type** is automatically populated in the **Delete This Charge Type** field.

Click the **Find** button to load a list of all Charge Items assigned to the selected **Charge Type**. When the **Find** button is clicked the selected **Charge Type** name populates in the header of the list of **Charge Items** to confirm the list contains Charge Items assigned to that **Charge Type**.

Transfer Charge Items

Charge Type From: Subject Animal Find... Charge Type To: --none--

Delete This Charge Type: Subject Animal Delete

Subject Animal Urine Dipstick

Type U-205 Urine Dipstick

Cancel Make Transfer

In this case there is one Charge Item assigned to the selected Charge Type. This Charge Item must be transferred to a different Charge Type before the selected Charge Type can be deleted.

Select the checkbox(es) at far left for all listed Charge Item(s), then click in the **Charge Type To** field to open a second dropdown list of previously created **Charge Types**.

Transfer Charge Items

Charge Type From: Subject Animal Find... Charge Type To: --none--

Delete This Charge Type: Subject Animal Delete

	Subject Animal Urine Dipstick
☒	Type U-205 Urine Dipstick

Cancel Make Transfer

Select the **Charge Type** to which the Charge Item(s) is(are) to be assigned. In this example, the “Subject Animal Labs” **Charge Type** is selected.

Transfer Charge Items

Charge Type From: Subject Animal Find... Charge Type To: Subject Animal

Delete This Charge Type: Subject Animal Delete

	Subject Animal Urine Dipstick
☒	Type U-205 Urine Dipstick

Cancel Make Transfer

Click the **Cancel** button to close the popup without completing the transfer.

Click the **Make Transfer** button to complete the transfer. The transfer is complete, and the **Setup Charge Ticket** page reloads.

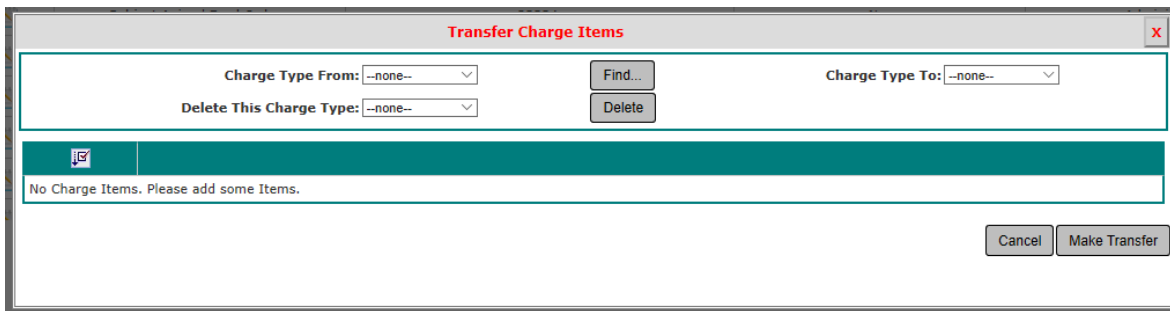
My Workspaces Vivarium **Setup Charge Ticket** Back

Transfer Charge Item(s) Add a New Charge Type

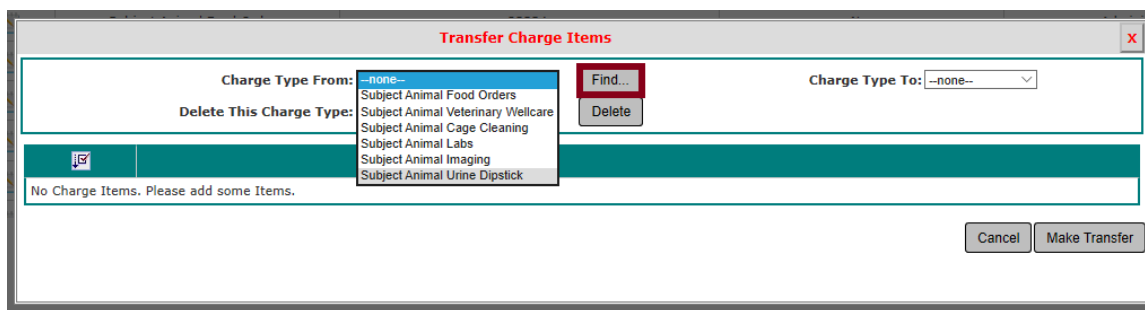
View	Edit	Charge Type	Object Code	Hide from Dropdown List?	Modified By
		Subject Animal Food Orders	23334	No	Administrator
		Subject Animal Veterinary Wellcare	68246	No	Administrator
		Subject Animal Cage Cleaning	248516	No	Administrator
		Subject Animal Labs	15749	No	Administrator
		Subject Animal Urine Dipstick	68514	No	Administrator

Note: The previously selected **Charge Type** is not automatically deleted from the **Setup Charge Ticket** page. This is to allow for conditions where Charge Items must be transferred between **Charge Types**, but no **Charge Types** are being deleted.

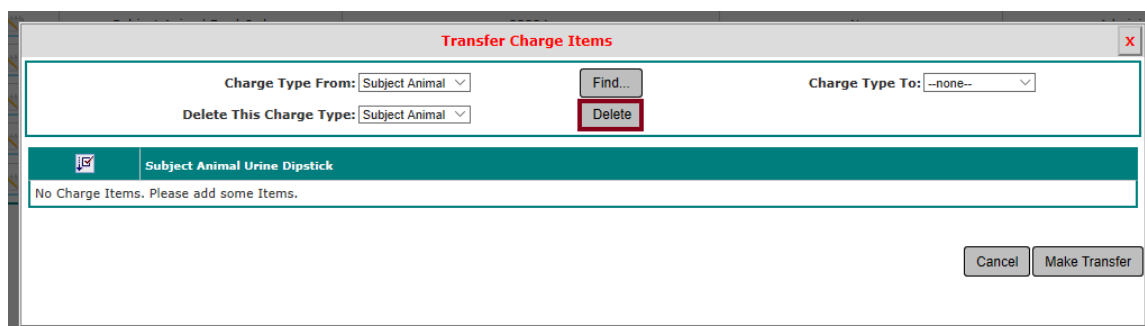
To proceed with deletion of the selected **Charge Type**, click the **Transfer Charge Item(s)** button. The **Transfer Charge Items** popup dialog box opens.



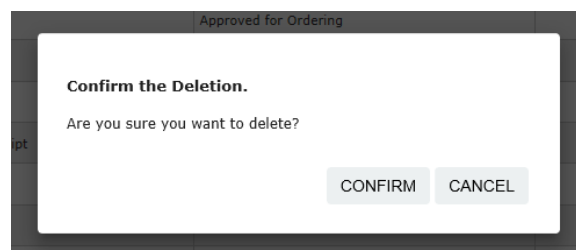
Recall that the Charge Items list is empty when the popup initially loads. Click in the **Charge Type From** field and select the **Charge Type** that is to be deleted.



Click the **Find** button to load the list of Charge Items assigned to the invalid **Charge Type** and confirm it is empty. Notice that the selected **Charge Type** automatically populates in the **Delete This Charge Type** field and in the header of the Charge Items list.



Click the **Delete** button. A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The **Charge Type** is deleted on the **Setup Charge Ticket** page.

My Workspaces		Vivarium Setup Charge Ticket			
View	Edit	Charge Type	Object Code	Hide from Dropdown List?	Modified By
		Subject Animal Food Orders	23334	No	Administrator
		Subject Animal Veterinary Wellcare	68246	No	Administrator
		Subject Animal Cage Cleaning	248516	No	Administrator
		Subject Animal Labs	15749	No	Administrator

If desired, click the **View** icon for the **Charge Type** to which the Charge Item(s) was(were) reassigned to verify the reassignment on the **Setup Charge Ticket - Charge Items** page.

My Workspaces

Vivarium

Setup Charge Ticket - Charge Items

Apply Rate(s)

Add a New Charge Item

Note: Any changes will apply to charge tickets made after the modification. When editing tickets that fall in the date range of a newly effective change, the updated value will be displayed in the dropdown menu for the charge item.

	Edit	Show History	Charge Item	Start Date	End Date	Cost	Previous Cost	Percent Difference	Hide from Dropdown List?	Modified By	Date Modified
☐			Type U-205 Urine Dipstick	10/01/2019	10/01/2020	15.00	0.00	0.00 %	No	Administrator	10/29/2019

View Non-Animal Charge Item Change History

The **Setup Charge Ticket - Charge Items** page includes details of cost change history via the **Cost**, **Previous Cost** and **Percent Difference** columns, and the **Show History** icon.

Cost is the current cost for the charge item.

Previous Cost is the cost most recently assigned to the charge item prior to the current **Cost**. If the value shown here is “0.00”, the cost of the charge item has never changed.

Percent Difference is the difference between the most recently assigned cost and the current **Cost**, expressed as a percentage.

To view change history, click the icon in the **Show History** column for the applicable record. *Note that there is no **Show History** icon available for records that have no change history.*

My Workspaces ▾ Vivarium **Setup Charge Ticket - Charge Items** [Back](#)

[Apply Rate\(s\)](#) [Add a New Charge Item](#)

Note: Any changes will apply to charge tickets made after the modification. When editing tickets that fall in the date range of a newly effective change, the updated value will be displayed in the dropdown menu for the charge item.

			Charge Item	Start Date	End Date	Cost	Previous Cost	Percent Difference	Hide from Dropdown List?	Modified By	Date Modified
☐			Goat Food	03/07/2019	03/04/2021	21.00	20.00	5.00 %	No	Administrator	03/07/2019
☐			Goat Milk	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Lion Food	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Feeding Service	03/07/2019	03/08/2023	10.30	10.00	3.00 %	No	Administrator	03/07/2019
☐			Pellets	03/01/2019	03/29/2019	15.00	0.00	0.00 %	No	Administrator	03/12/2019

A change history list opens for the selected record. All prior versions of the record are shown here. In the screenshot below the selected record has only been changed once since it was created.

My Workspaces ▾ Vivarium **Setup Charge Ticket - Charge Items** [Back](#)

[Apply Rate\(s\)](#) [Add a New Charge Item](#)

Note: Any changes will apply to charge tickets made after the modification. When editing tickets that fall in the date range of a newly effective change, the updated value will be displayed in the dropdown menu for the charge item.

			Charge Item	Start Date	End Date	Cost	Previous Cost	Percent Difference	Hide from Dropdown List?	Modified By	Date Modified
☐			Goat Food	03/07/2019	03/04/2021	21.00	20.00	5.00 %	No	Administrator	03/07/2019
			Goat Food	02/24/2019	02/24/2020	20.00	0.00	0.00 %	No	Administrator	03/07/2019
☐			Goat Milk	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Lion Food	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Feeding Service	03/07/2019	03/08/2023	10.30	10.00	3.00 %	No	Administrator	03/07/2019
☐			Pellets	03/01/2019	03/29/2019	15.00	0.00	0.00 %	No	Administrator	03/12/2019

Click the icon in the **Show History** column for the applicable record again to close the history list.

Add Non-Animal Charge Item

On the **Setup Charge Ticket** page, click the icon in the **View** column for the **Charge Type** to which the new **Charge Item** is to be assigned.

My Workspaces ▾ Vivarium **Setup Charge Ticket** [Back](#)

[Transfer Charge Items\(s\)](#) [Add a New Charge Type](#)

		Charge Type	Object Code	Hide from Dropdown List?	Modified By
		Subject Animal Food Orders	23334	No	Administrator
		Subject Animal Veterinary Wellcare	68246	No	Administrator
		Subject Animal Cage Cleaning	248516	No	Administrator
		Subject Animal Labs	15749	No	Administrator
		Subject Animal Imaging	45812	No	Administrator

The **Setup Charge Ticket - Charge Items** page is opened for the selected **Charge Type**. In the screenshot below, the “Subject Animal Food Orders” **Charge Type** is selected. Click the **Add a New Charge Item** button.

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Vivarium

Setup Charge Ticket - Charge Items

Back

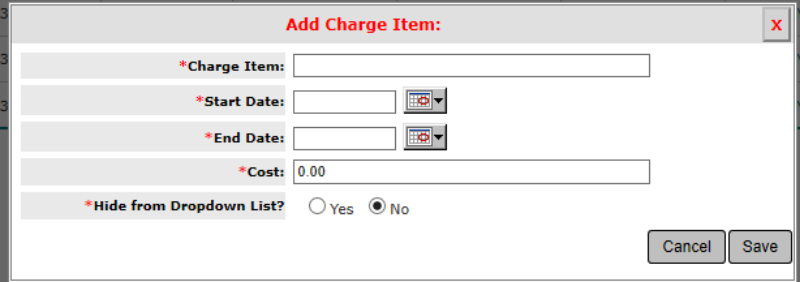
Apply Rate(s)

Add a New Charge Item

Note: Any changes will apply to charge tickets made after the modification. When editing tickets that fall in the date range of a newly effective change, the updated value will be displayed in the dropdown menu for the charge item.

	Edit	Show History	Charge Item	Start Date	End Date	Cost	Previous Cost	Percent Difference	Hide from Dropdown List?	Modified By	Date Modified
☐			Goat Food	03/07/2019	03/04/2021	21.00	20.00	5.00 %	No	Administrator	03/07/2019
☐			Goat Milk	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Lion Food	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Feeding Service	03/07/2019	03/08/2023	10.30	10.00	3.00 %	No	Administrator	03/07/2019
☐			Pellets	03/01/2019	03/29/2019	15.00	0.00	0.00 %	No	Administrator	03/12/2019

An **Add Charge Item** popup dialog box opens for creation of the new record.



Add Charge Item:

*Charge Item:

*Start Date:

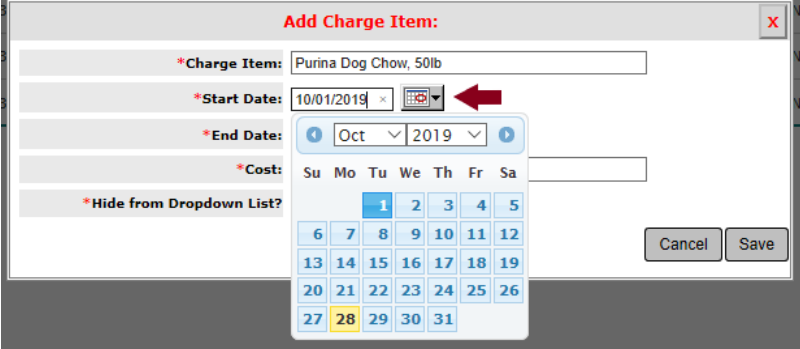
*End Date:

*Cost:

*Hide from Dropdown List? ☐ Yes ☒ No

Enter the desired **Charge Item** name.

Manually enter the desired effective **Start Date** for the charge item or click the calendar button to the right of the field to select a date from the calendar widget.



Add Charge Item:

*Charge Item:

*Start Date:

*End Date:

*Cost:

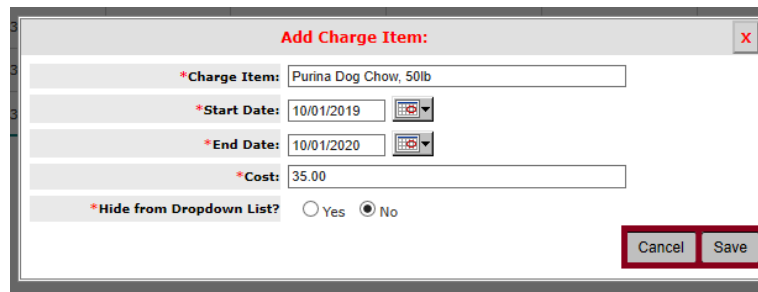
*Hide from Dropdown List? ☐ Yes ☒ No

Calendar widget showing dates from 1 to 31, with 10/01/2019 selected.

Manually enter the desired effective **End Date** for the charge item or click the calendar button to the right of the field to select a date from the calendar widget.

Enter the desired **Cost** of the charge item in dollars and cents.

Select “Yes” or “No” for **Hide from Dropdown List?** A selection of “No” means this charge item will be visible and available for selection where the charge item list appears. A selection of “Yes” means this charge item will not be visible or available for selection in the charge item list.



Add Charge Item:

* Charge Item: Purina Dog Chow, 50lb

* Start Date: 10/01/2019

* End Date: 10/01/2020

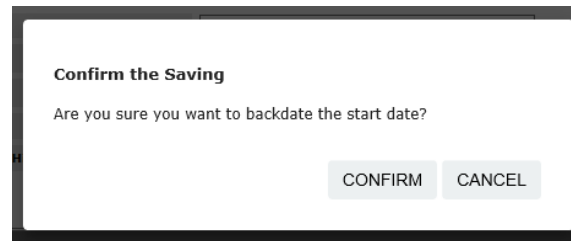
* Cost: 35.00

* Hide from Dropdown List? ☐ Yes ☒ No

Cancel Save

Click **Cancel** to close the popup without saving the new record.

Click **Save** to save the new record. If the **Start Date** entered is in the past, a confirmation popup dialog box appears.



Confirm the Saving

Are you sure you want to backdate the start date?

CONFIRM CANCEL

Click **CANCEL** to close the confirmation popup and return to the **Add Charge Item** popup.

Click **CONFIRM** to save the record and close both the confirmation and **Add Charge Item** popups. The record is added on the **Setup Charge Ticket - Charge Items** page.

My Workspaces Vivarium **Setup Charge Ticket - Charge Items** Back

Apply Rate(s) Add a New Charge Item

Note: Any changes will apply to charge tickets made after the modification. When editing tickets that fall in the date range of a newly effective change, the updated value will be displayed in the dropdown menu for the charge item.

	Edit	Show History	Charge Item	Start Date	End Date	Cost	Previous Cost	Percent Difference	Hide from Dropdown List?	Modified By	Date Modified
☐			Goat Food	03/07/2019	03/04/2021	21.00	20.00	5.00 %	No	Administrator	03/07/2019
☐			Goat Milk	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Lion Food	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Feeding Service	03/07/2019	03/08/2023	10.30	10.00	3.00 %	No	Administrator	03/07/2019
☐			Pellets	03/01/2019	03/29/2019	15.00	0.00	0.00 %	No	Administrator	03/12/2019
☐			Purina Dog Chow, 50lb	10/01/2019	10/01/2020	35.00	0.00	0.00 %	No	Administrator	10/28/2019

Edit Non-Animal Charge Item

On the **Setup Charge Ticket** page, click the icon in the **View** column for the **Charge Type** to which the applicable **Charge Item** is assigned.

My Workspaces ▾ Vivarium		Setup Charge Ticket Back			
		Transfer Charge Item(s)		Add a New Charge Type	
View	Edit	Charge Type	Object Code	Hide from Dropdown List?	Modified By
		Subject Animal Food Orders	23334	No	Administrator
		Subject Animal Veterinary Wellcare	68246	No	Administrator
		Subject Animal Cage Cleaning	248516	No	Administrator
		Subject Animal Labs	15749	No	Administrator
		Subject Animal Imaging	45812	No	Administrator

The **Setup Charge Ticket - Charge Items** page is opened for the selected **Charge Type**. In the screenshot below, the “Subject Animal Food Orders” **Charge Type** is selected. Click the icon in the **Edit** column for the applicable **Charge Item**.

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Vivarium

Setup Charge Ticket - Charge Items

Apply Rate(s)

Add a New Charge Item

Note: Any changes will apply to charge tickets made after the modification. When editing tickets that fall in the date range of a newly effective change, the updated value will be displayed in the dropdown menu for the charge item.

	Edit	Show History	Charge Item	Start Date	End Date	Cost	Previous Cost	Percent Difference	Hide from Dropdown List?	Modified By	Date Modified
☐			Goat Food	03/07/2019	03/04/2021	21.00	20.00	5.00 %	No	Administrator	03/07/2019
☐			Goat Milk	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Lion Food	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Feeding Service	03/07/2019	03/08/2023	10.30	10.00	3.00 %	No	Administrator	03/07/2019
☐			Pellets	03/01/2019	03/29/2019	15.00	0.00	0.00 %	No	Administrator	03/12/2019
☐			Purina Dog Chow, 50lb	10/01/2019	10/01/2020	35.00	0.00	0.00 %	No	Administrator	10/28/2019

The record is opened for editing in the **Add Charge Item** popup dialog box.

Add Charge Item: X

*Charge Item:

Purina Dog Chow, 35lb

*Start Date:

10/01/2019

*End Date:

10/01/2020

*Cost:

35.00

*Hide from Dropdown List?

☐ Yes
 ☒ No

Cancel

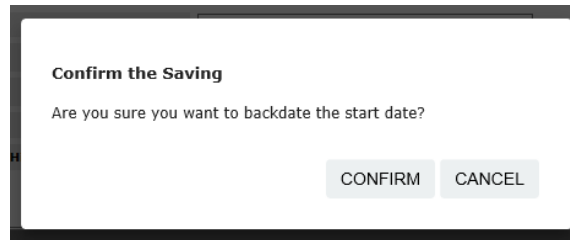
Save

Make desired changes in the popup.

Note that a selection of “No” for **Hide from Dropdown List?** means this charge item will be visible and available for selection everywhere in iRIS™ where the charge item list appears. A selection of “Yes” means this charge item will not be visible or available for selection in the charge item list.

Click **Cancel** to close the popup without saving changes.

Click **Save** to save changes and close the popup. If the **Start Date** entered is in the past, a confirmation popup dialog box appears.



Click **CANCEL** to close the confirmation popup and return to the **Add Charge Item** popup.

Click **CONFIRM** to save changes and close both the confirmation and **Add Charge Item** popups.

My Workspaces Vivarium **Setup Charge Ticket - Charge Items** [Apply Rate\(s\)](#) [Add a New Charge Item](#)

Note: Any changes will apply to charge tickets made after the modification. When editing tickets that fall in the date range of a newly effective change, the updated value will be displayed in the dropdown menu for the charge item.

			Charge Item	Start Date	End Date	Cost	Previous Cost	Percent Difference	Hide from Dropdown List?	Modified By	Date Modified
☐			Goat Food	03/07/2019	03/04/2021	21.00	20.00	5.00 %	No	Administrator	03/07/2019
☐			Goat Milk	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Lion Food	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Feeding Service	03/07/2019	03/08/2023	10.30	10.00	3.00 %	No	Administrator	03/07/2019
☐			Pellets	03/01/2019	03/29/2019	15.00	0.00	0.00 %	No	Administrator	03/12/2019
☐			Purina Dog Chow, 35lb	10/01/2019	10/01/2020	35.00	35.00	0.00 %	No	Administrator	10/28/2019

The record is revised on the **Setup Charge Ticket - Charge Items** page, and now has an icon in the **Show History** column. Click the icon to confirm change history for the record.

My Workspaces Vivarium **Setup Charge Ticket - Charge Items** [Apply Rate\(s\)](#) [Add a New Charge Item](#)

Note: Any changes will apply to charge tickets made after the modification. When editing tickets that fall in the date range of a newly effective change, the updated value will be displayed in the dropdown menu for the charge item.

			Charge Item	Start Date	End Date	Cost	Previous Cost	Percent Difference	Hide from Dropdown List?	Modified By	Date Modified
☐			Goat Food	03/07/2019	03/04/2021	21.00	20.00	5.00 %	No	Administrator	03/07/2019
☐			Goat Milk	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Lion Food	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Feeding Service	03/07/2019	03/08/2023	10.30	10.00	3.00 %	No	Administrator	03/07/2019
☐			Pellets	03/01/2019	03/29/2019	15.00	0.00	0.00 %	No	Administrator	03/12/2019
☐			Purina Dog Chow, 35lb	10/01/2019	10/01/2020	35.00	35.00	0.00 %	No	Administrator	10/28/2019
☐			Purina Dog Chow, 50lb	10/01/2019	10/01/2020	35.00	0.00	0.00 %	No	Administrator	10/28/2019

Apply Charge Item Rate(s)

It is possible to apply a markup or discount rate to charge items while still retaining the underlying **Cost** of a charge item for audit trail or accounting purposes.

On the **Setup Charge Ticket** page, click the icon in the **View** column for the **Charge Type** to which the applicable **Charge Item(s)** are assigned.

My Workspaces		Vivarium	Setup Charge Ticket			Back
				Transfer Charge Items(s)	Add a New Charge Type	
View	Edit	Charge Type	Object Code	Hide from Dropdown List?	Modified By	
		Subject Animal Food Orders	23334	No	Administrator	
		Subject Animal Veterinary Wellcare	68246	No	Administrator	
		Subject Animal Cage Cleaning	248516	No	Administrator	
		Subject Animal Labs	15749	No	Administrator	
		Subject Animal Imaging	45812	No	Administrator	

The **Setup Charge Ticket - Charge Items** page is opened for the selected **Charge Type**. In the screenshot below, the “Subject Animal Food Orders” **Charge Type** is selected.

Select the checkbox(es) at far left for the records to which a rate is being applied, then click the **Apply Rate(s)** button.

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Vivarium

Setup Charge Ticket - Charge Items

Back

Apply Rate(s)

Add a New Charge Item

Note: Any changes will apply to charge tickets made after the modification. When editing tickets that fall in the date range of a newly effective change, the updated value will be displayed in the dropdown menu for the charge item.

	Edit	Show History	Charge Item	Start Date	End Date	Cost	Previous Cost	Percent Difference	Hide from Dropdown List?	Modified By	Date Modified
☒			Goat Food	03/07/2019	03/04/2021	21.00	20.00	5.00 %	No	Administrator	03/07/2019
☒			Goat Milk	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Lion Food	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Feeding Service	03/07/2019	03/08/2023	10.30	10.00	3.00 %	No	Administrator	03/07/2019
☐			Pellets	03/01/2019	03/29/2019	15.00	0.00	0.00 %	No	Administrator	03/12/2019
☐			Purina Dog Chow, 35lb	10/01/2019	10/01/2020	35.00	35.00	0.00 %	No	Administrator	10/28/2019

An **Add Item Rate** popup dialog box opens for entry of rate details.

Add Item Rate

*Rate:

%

*Start Date:

*End Date:

Cancel

Save

Enter the desired **Rate**, expressed as a percentage of the current **Cost** of the selected **Charge Item(s)**. Enter a positive number for a markup rate, enter a negative number for a discount rate.

Manually enter the desired effective **Start Date** for the item rate or click the calendar button to the right of the field to select a date from the calendar widget.

Manually enter the desired effective **End Date** for the item rate or click the calendar button to the right of the field to select a date from the calendar widget.

Click **Cancel** to close the popup without applying the rate to records selected on the **Charge Items** page.

CAUTION: When the popup is closed without saving, records previously selected on the **Setup Charge Ticket - Charge Items** page remain selected until the user clears their select checkboxes.

Click **Save** to apply the rate to records previously selected on the **Setup Charge Ticket - Charge Items** page and close the popup. The rate is applied to the selected records on the **Setup Charge Ticket - Charge Items** page. The new **Cost** is automatically calculated by the system.

My Workspaces

Vivarium

Setup Charge Ticket - Charge Items

Back

Apply Rate(s) Add a New Charge Item

Note: Any changes will apply to charge tickets made after the modification. When editing tickets that fall in the date range of a newly effective change, the updated value will be displayed in the dropdown menu for the charge item.

	Edit	Show History	Charge Item	Start Date	End Date	Cost	Previous Cost	Percent Difference	Hide from Dropdown List?	Modified By	Date Modified
☐			Lion Food	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Feeding Service	03/07/2019	03/08/2023	10.30	10.00	3.00 %	No	Administrator	03/07/2019
☐			Pellets	03/01/2019	03/29/2019	15.00	0.00	0.00 %	No	Administrator	03/12/2019
☐			Goat Food	10/31/2019	10/31/2020	21.53	21.00	2.50 %	No	Administrator	10/28/2019
☐			Goat Milk	10/31/2019	10/31/2020	10.76	10.50	2.50 %	No	Administrator	10/28/2019
☐			Purina Dog Chow, 35lb	10/01/2019	10/01/2020	35.00	35.00	0.00 %	No	Administrator	10/28/2019

Click the icons in the **Show History** column to verify history for the selected records.

My Workspaces

Vivarium

Setup Charge Ticket - Charge Items

Back

Apply Rate(s)

Add a New Charge Item

Note: Any changes will apply to charge tickets made after the modification. When editing tickets that fall in the date range of a newly effective change, the updated value will be displayed in the dropdown menu for the charge item.

	Edit	Show History	Charge Item	Start Date	End Date	Cost	Previous Cost	Percent Difference	Hide from Dropdown List?	Modified By	Date Modified
☐			Lion Food	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	03/07/2019
☐			Feeding Service	03/07/2019	03/08/2023	10.30	10.00	3.00 %	No	Administrator	03/07/2019
☐			Pellets	03/01/2019	03/29/2019	15.00	0.00	0.00 %	No	Administrator	03/12/2019
☐			Goat Food	10/31/2019	10/31/2020	21.53	21.00	2.50 %	No	Administrator	10/28/2019
			Goat Food	03/07/2019	03/04/2021	21.00	20.00	5.00 %	No	Administrator	10/28/2019
			Goat Food	02/24/2019	02/24/2020	20.00	0.00	0.00 %	No	Administrator	03/07/2019
☐			Goat Milk	10/31/2019	10/31/2020	10.76	10.50	2.50 %	No	Administrator	10/28/2019
			Goat Milk	03/07/2019	03/04/2021	10.50	10.00	5.00 %	No	Administrator	10/28/2019
			Goat Milk	02/24/2019	02/24/2020	10.00	0.00	0.00 %	No	Administrator	03/07/2019
☐			Purina Dog Chow, 35lb	10/01/2019	10/01/2020	35.00	35.00	0.00 %	No	Administrator	10/28/2019

Animal Orders Configuration

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Charge Master** link.

My Workspaces
Vivarium
Board Administration

System Setup
List Maintenance Setup
Clean-up

- Setup Cage Care Template
- Setup Per Diem Definitions and Rates
- Setup Veterinarian Profile
- Setup Transfer Coordinator Profile
- Setup Treatment Plan Templates by Species
- Setup Charge Master
- Setup Generation
- Setup Life Status

The **Setup Charge Master** page opens. Click the icon in the **View** column for **Animal Orders**.

My Workspaces		Vivarium		Setup Charge Master		Back
View		Charge Master				
		Charge Ticket				
View		Charge Master				
		Animal Orders				

The **Setup Animal Order** page opens.

My Workspaces

Vivarium

Setup Animal Order

Back

Add a New Charge Type

View	Edit	Default?	Charge Type	Object Code	Modified By
		No	Rodent Subject Animals	25784	Administrator
		No	Canine Subject Animals	22008	Administrator
		No	Insect Subject Animals	68425	Administrator

Add Animal Order Charge Type

On the **Setup Charge Master** page, click the icon in the **View** column for **Animal Orders**.

My Workspaces 

Vivarium

Setup Charge Master  Back

View	Charge Master
	Charge Ticket

View	Charge Master
	Animal Orders

The **Setup Animal Order** page opens. Click the **Add a New Charge Type** button.

My Workspaces 

Vivarium

Setup Animal Order

 Back

Add a New Charge Type

View	Edit	Default?	Charge Type	Object Code	Modified By
		No	Rodent Subject Animals	25784	Administrator
		No	Canine Subject Animals	22008	Administrator
		No	Insect Subject Animals	68425	Administrator

The **Charge Type** popup dialog box opens for creation of the new record.

Charge Type: X

*Charge Type: Bovine Subject Animals

*Object Code: 35198

*Default Charge Type?

☐ Yes
 ☒ No

*Hide from Dropdown List?

☐ Yes
 ☒ No

(Note: Only three charge types can be set as the default)

Cancel

Save Charge Type

Enter the desired **Charge Type** name and **Object Code**.

Select “Yes” or “No” for **Default Charge Type?**

A selection of “Yes” means:

- this **Charge Type** item will be set as the default selection in the Animal **Charge Type** picklist
- it will be possible to set a Charge *Item* assigned to this **Charge Type** as the default selection in the Animal Charge *Item* picklist

A selection of “No” means:

- this **Charge Type** will *not* be set as the default selection in the Animal Charge Type picklist
- it will *not* be possible to set a Charge Item assigned to this **Charge Type** as the default selection in the Animal Charge Item picklist

Select “Yes” or “No” for **Hide from Dropdown List?** A selection of “No” means this charge type will be visible and available for selection everywhere in iRIS™ where the Animal Charge Type dropdown picklist appears. A selection of “Yes” means this charge type will not be visible or available for selection in the Animal Charge Type dropdown picklist.

Click **Cancel** to close the popup without saving the record.

Click **Save Charge Type** to save the record and close the popup. The record is added on the **Setup Animal Order** page.

My Workspaces ☒		Vivarium	Setup Animal Order Back			Add a New Charge Type
View	Edit	Default?	Charge Type	Object Code	Modified By	
		No	Rodent Subject Animals	25784	Administrator	
		No	Canine Subject Animals	22008	Administrator	
		No	Insect Subject Animals	68425	Administrator	
		No	Bovine Subject Animals	35198	Administrator	

Edit Animal Order Charge Type

On the **Setup Charge Master** page, click the icon in the **View** column for **Charge Ticket**.

My Workspaces ▾	Vivarium	Setup Charge Master	Back
View	Charge Master		
	Charge Ticket		
View	Charge Master		
	Animal Orders		

The **Setup Charge Ticket** page opens. Click the icon in the **Edit** column for the applicable record.

My Workspaces 

Vivarium

Setup Animal Order

 Back

Add a New Charge Type

View	Edit	Default?	Charge Type	Object Code	Modified By
		No	Rodent Subject Animals	25784	Administrator
		No	Canine Subject Animals	22008	Administrator
		No	Insect Subject Animals	68425	Administrator
		No	Bovine Subject Animals	35198	Administrator

The record is opened for editing in a **Charge Type** popup dialog box.

Charge Type:

*Charge Type:

*Object Code:

*Default Charge Type? ☐ Yes ☒ No

*Hide from Dropdown List? ☐ Yes ☒ No

(Note: Only three charge types can be set as the default)

Cancel Save Charge Type

Make desired changes in the popup.

A selection of “Yes” for **Default Charge Type?** means:

- this **Charge Type** item will be set as the default selection in the Animal **Charge Type** picklist
- it will be possible to set a Charge *Item* assigned to this **Charge Type** as the default selection in the Animal Charge *Item* picklist

A selection of “No” for **Default Charge Type?** means:

- this **Charge Type** will *not* be set as the default selection in the Animal Charge Type picklist

- it will *not* be possible to set a Charge Item assigned to this **Charge Type** as the default selection in the Animal Charge Item picklist

A selection of “No” for **Hide from Dropdown List?** means this charge type will be visible and available for selection everywhere in iRIS™ where the Animal Charge Type dropdown picklist appears. A selection of “Yes” for **Hide from Dropdown List?** means this charge type will not be visible or available for selection in the Animal Charge Type dropdown picklist.

Click **Cancel** to close the popup without saving changes.

Click **Save Charge Type** to save the record and close the popup. The record is revised on the **Setup Animal Order** page.

My Workspaces

Vivarium

Setup Animal Order

Back

Add a New Charge Type

View	Edit	Default?	Charge Type	Object Code	Modified By
		No	Rodent Subject Animals	25784	Administrator
		No	Canine Subject Animals	22008	Administrator
		No	Insect Subject Animals	68425	Administrator
		No	Small Bovine Subject Animals	35198	Administrator

Animal Charge Items

On the **Setup Charge Master** page, click the icon in the **View** column for **Charge Ticket**.

My Workspaces 

Vivarium

Setup Charge Master  Back

View	Charge Master
	Charge Ticket

View	Charge Master
	Animal Orders

The **Setup Charge Ticket** page opens. Click the icon in the **View** column for the applicable record.

My Workspaces

Vivarium

Setup Animal Order

Add a New Charge Type

View	Edit	Default?	Charge Type	Object Code	Modified By
		No	Rodent Subject Animals	25784	Administrator
		No	Canine Subject Animals	22008	Administrator
		No	Insect Subject Animals	68425	Administrator
		No	Small Bovine Subject Animals	35198	Administrator

The **Setup Animal Orders - Charge Items** page is opened for the selected record. In the example screenshot below, the **Rodent Subject Animals Charge Type** record is selected. Records are sorted in ascending order of **Start Date**.

My Workspaces

Vivarium

Setup Animal Orders - Charge Items

Back

Add a New Charge Item

Edit	Default	Show History	Charge Item	Start Date	End Date	Cost	Hide from Dropdown List?	Modified By
	No		Mice (50)	02/26/2019	02/24/2020	65.00	No	Administrator
	No		Rats (50)	03/08/2019	03/28/2019	75.00	No	Administrator
	No		Guinea Pigs (25)	03/08/2019	03/17/2021	52.00	No	Administrator

Animal order **Charge Items** can be added or edited from this page. It is also possible to view **Charge Item** change history from this page.

View Animal Charge Item Change History

The **Setup Animal Orders - Charge Items** page includes details of **Charge Item** change history via the **Cost** column and a **Show History** icon.

To view change history, click the icon in the **Show History** column for the applicable record. *Note that there is no **Show History** icon available for records that have no change history.*

My Workspaces

Vivarium

Setup Animal Orders - Charge Items

Add a New Charge Item

Edit	Default	Show History	Charge Item	Start Date	End Date	Cost	Hide from Dropdown List?	Modified By
	No		Mice (50)	02/26/2019	02/24/2020	65.00	No	Administrator
	No		Rats (50)	03/08/2019	03/28/2019	75.00	No	Administrator
	No		Guinea Pigs (25)	03/08/2019	03/17/2021	52.00	No	Administrator

A change history list opens for the selected record. All prior versions of the record are shown here; in the screenshot below the selected record has only been changed once since it was created.

My Workspaces

Vivarium

Setup Animal Orders - Charge Items

Back

Add a New Charge Item

Edit	Default	Show History	Charge Item	Start Date	End Date	Cost	Hide from Dropdown List?	Modified By
	No		Mice (50)	02/26/2019	02/24/2020	65.00	No	Administrator
	No		Rats (50)	03/08/2019	03/28/2019	75.00	No	Administrator
	No		Rats	03/08/2019	03/28/2019	20.00	No	Administrator
	No		Guinea Pigs (25)	03/08/2019	03/17/2021	52.00	No	Administrator

Click the icon in the **Show History** column for the applicable record again to close the history list.

Add Animal Charge Item

On the **Setup Animal Order** page, click the icon in the **View** column for the **Charge Type** to which the new **Charge Item** is to be assigned.

My Workspaces

Vivarium

Setup Animal Order

Back

Add a New Charge Type

View	Edit	Default?	Charge Type	Object Code	Modified By
		No	Rodent Subject Animals	25784	Administrator
		No	Canine Subject Animals	22008	Administrator
		No	Insect Subject Animals	68425	Administrator

The **Setup Animal Orders - Charge Items** page is opened for the selected **Charge Type**. In the screenshot below, the “Rodent Subject Animals” **Charge Type** is selected. Click the **Add a New Charge Item** button.

My Workspaces

Vivarium

Setup Animal Orders - Charge Items

Back

Add a New Charge Item

Edit	Default	Show History	Charge Item	Start Date	End Date	Cost	Hide from Dropdown List?	Modified By
	No		Mice (50)	02/26/2019	02/24/2020	65.00	No	Administrator
	No		Rats (50)	03/08/2019	03/28/2019	75.00	No	Administrator
	No		Guinea Pigs (25)	03/08/2019	03/17/2021	52.00	No	Administrator

An **Add Charge Item** popup dialog box opens for creation of the new record.

Enter the desired **Charge Item** name.

Manually enter the desired effective **Start Date** for the **Charge Item** or click the calendar button to the right of the field to select a date from the calendar widget.

Manually enter the desired effective **End Date** for the **Charge Item** or click the calendar button to the right of the field to select a date from the calendar widget.

Enter the desired **Cost** of the **Charge Item** in dollars and cents.

Select “Yes” or “No” for **Hide from Dropdown List?** A selection of “No” means this **Charge Item** will be visible and available for selection everywhere in iRIS™ where the **Charge Item** list appears. A selection of “Yes” means this **Charge Item** will not be visible or available for selection in the **Charge Item** list.

Select “Yes” or “No” for **Default?** A selection of “No” means this **Charge Item** will not be selected by default in the Animal Orders **Charge Item** list. A selection of “Yes” means this **Charge Item** will be selected by default in the Animal Orders **Charge Item** list.

*Note that a **Charge Item** can only be set as the default if its parent **Charge Type** (as shown on the **Setup Animal Order** page) is also set as a default.*

Add Charge Item:

*Charge Item: Mice (100)

*Start Date: 10/01/2019

*End Date: 10/01/2020

*Cost: 100.00

*Hide from Dropdown List? ☐ Yes ☒ No

*Default? ☒ Yes ☐ No

(Note: Only one Charge Item can be set as default)

Cancel Save

Click **Cancel** to close the popup without saving the new record.

Click **Save** to save the record and close the popup. The record is added on the **Setup Animal Orders - Charge Items** page.

My Workspaces Vivarium **Setup Animal Orders - Charge Items** Back

Add a New Charge Item

Edit	Default	Show History	Charge Item	Start Date	End Date	Cost	Hide from Dropdown List?	Modified By
	No		Mice (50)	02/26/2019	02/24/2020	65.00	No	Administrator
	No		Rats (50)	03/08/2019	03/28/2019	75.00	No	Administrator
	No		Guinea Pigs (25)	03/08/2019	03/17/2021	52.00	No	Administrator
	Yes		Mice (100)	10/01/2019	10/01/2020	100.00	No	Administrator

Note: if the error popup shown below displays when the **Save** button is clicked, see the **Animal Charge Item Default Record Error** section of this manual for instructions to resolve the error.

*Charge Item: Mice (100)

The Charge Type for this Charge Item has not been defaulted.
Please change the Charge Type defaults.

OK (3)

Edit Animal Charge Item

On the **Setup Animal Order** page, click the icon in the **View** column for the **Charge Type** to which the applicable **Charge Item** is assigned.

My Workspaces

Vivarium

Setup Animal Order

Back

Add a New Charge Type

View	Edit	Default?	Charge Type	Object Code	Modified By
		No	Rodent Subject Animals	25784	Administrator
		No	Canine Subject Animals	22008	Administrator
		No	Insect Subject Animals	68425	Administrator

The **Setup Animal Orders - Charge Items** page is opened for the selected **Charge Type**. In the screenshot below, the “Rodent Subject Animals” **Charge Type** is selected. Click the icon in the **Edit** column for the applicable **Charge Item**.

My Workspaces

Vivarium

Setup Animal Orders - Charge Items

Add a New Charge Item

Edit	Default	Show History	Charge Item	Start Date	End Date	Cost	Hide from Dropdown List?	Modified By
	No		Mice (50)	02/26/2019	02/24/2020	65.00	No	Administrator
	No		Rats (50)	03/08/2019	03/28/2019	75.00	No	Administrator
	No		Guinea Pigs (25)	03/08/2019	03/17/2021	52.00	No	Administrator
	No		Mice (100)	10/01/2019	10/01/2020	100.00	No	Administrator

The record is opened for editing in the **Add Charge Item** popup dialog box.

Add Charge Item:

*Charge Item: Mice (100)

*Start Date: 10/01/2019

*End Date: 10/01/2020

*Cost: 100.00

*Hide from Dropdown List?

☐ Yes ☒ No

*Default?

☒ Yes ☐ No

(Note: Only one Charge Item can be set as default)

Cancel

Save

Make desired changes in the popup.

A selection of “No” for **Hide from Dropdown List?** means this **Charge Item** will be visible and available for selection everywhere in iRIS™ where the **Charge Item** list appears. A selection of “Yes” for **Hide from Dropdown List?** means this **Charge Item** will not be visible or available for selection in the **Charge Item** list.

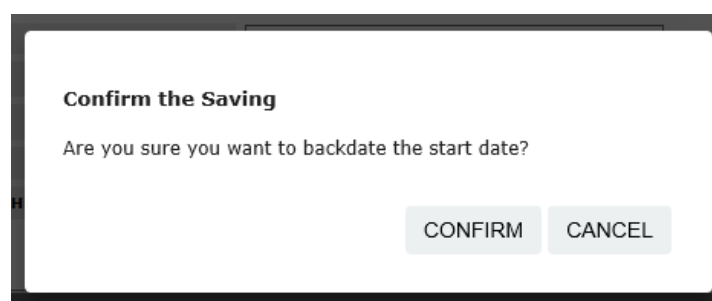
A selection of “No” for **Default?** means this **Charge Item** will not be selected by default in the Animal Orders **Charge Item** list. A selection of “Yes” for **Default?** means this **Charge Item** will be selected by default in the Animal Orders **Charge Item** list.

Note that a **Charge Item** can only be set as the default if its parent **Charge Type** (as shown on the **Setup Animal Order** page) is also set as a default.

In this example, the **Default?** selection is changed from “No” to “Yes”.

Click **Cancel** to close the popup without saving changes.

Click **Save** to save changes and close the popup. If the **Start Date** entered is in the past, a confirmation popup dialog box appears.



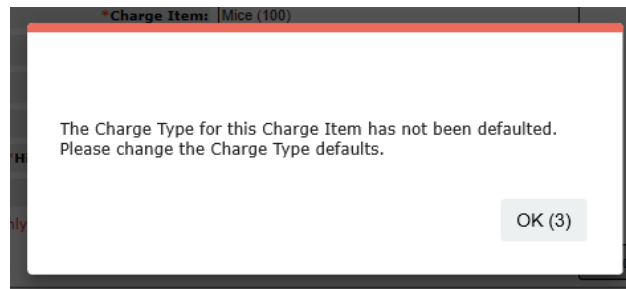
Click **CANCEL** to close the confirmation popup and return to the **Add Charge Item** popup.

Click **CONFIRM** to save changes and close both the confirmation and **Add Charge Item** popups. The record is revised on the **Setup Animal Orders - Charge Items** page.

My Workspaces		Vivarium	Setup Animal Orders - Charge Items					
Edit	Default	Show History	Charge Item	Start Date	End Date	Cost	Hide from Dropdown List?	Modified By
	No		Mice (50)	02/26/2019	02/24/2020	65.00	No	Administrator
	No		Rats (50)	03/08/2019	03/28/2019	75.00	No	Administrator
	No		Guinea Pigs (25)	03/08/2019	03/17/2021	52.00	No	Administrator
	Yes		Mice (100)	10/01/2019	10/01/2020	100.00	No	Administrator

A folder icon now appears in the **Show History** column for the revised record, indicating that prior versions of the record exist. See the View Animal Charge Item Change History section of this manual for more information.

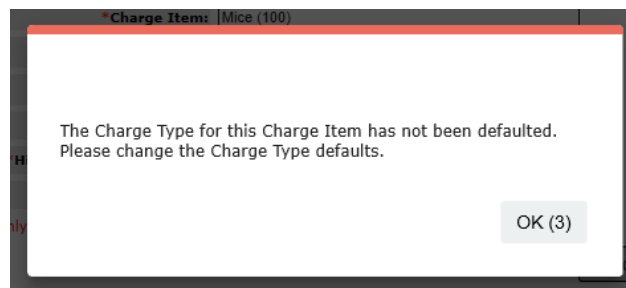
Note: if the error popup shown below displays when the **Save** button is clicked, see the Animal Charge Item Default Record Error section of this manual for instructions to resolve the error.



Animal Charge Item Default Record Error

Recall that a Charge Item can only be set as the default if its parent Charge Type (as shown on the Setup Animal Order page) is also set as a default.

If “Yes” is selected for **Default** in the Add Charge Item popup when the parent Charge Type (as shown on the Setup Animal Order page) is not set as a default, the following error displays for three seconds when the **Save** button is clicked.



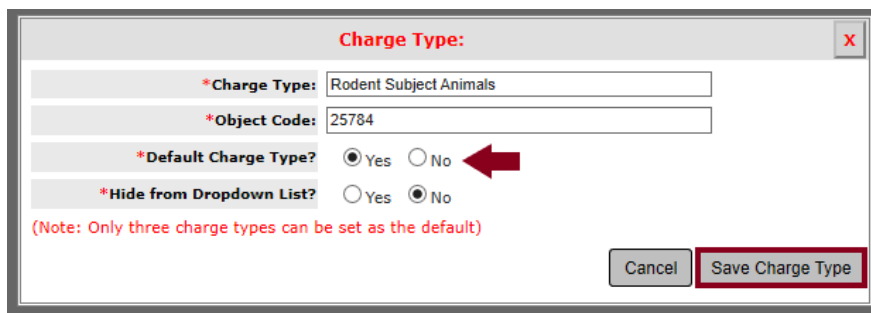
When the error popup closes, either:

1. Change the **Default** selection in the **Add Charge Item** popup to “No” and click **Save**.

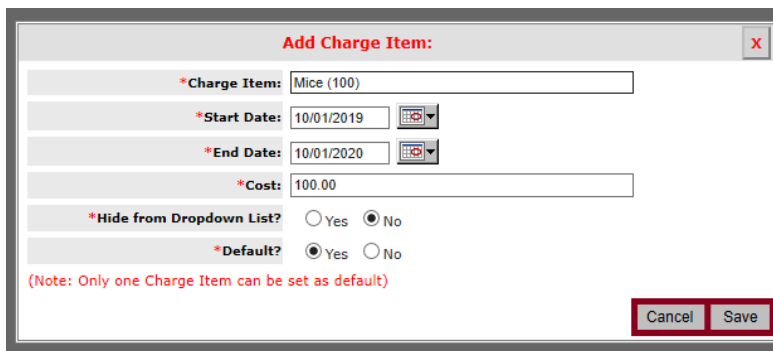
A screenshot of the 'Add Charge Item' form. The title bar says 'Add Charge Item:'. The form contains the following fields: '*Charge Item:' with the value 'Mice (100)'; '*Start Date:' with the value '10/01/2019'; '*End Date:' with the value '10/01/2020'; '*Cost:' with the value '100.00'; '*Hide from Dropdown List?' with radio buttons for 'Yes' and 'No' (selected); and '*Default?' with radio buttons for 'Yes' and 'No' (selected). A red arrow points to the 'No' radio button for the 'Default?' field. At the bottom, there is a note: '(Note: Only one Charge Item can be set as default)'. There are 'Cancel' and 'Save' buttons at the bottom right.

OR

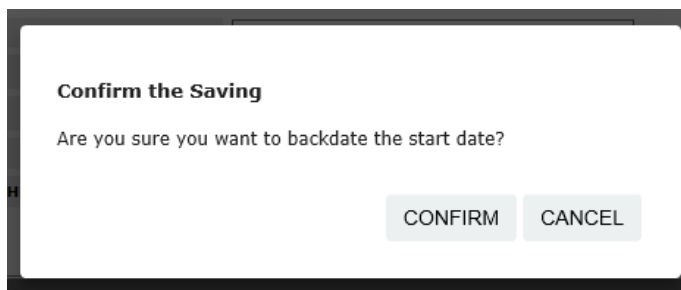
2. Return to the Setup Animal Order Page and change the parent **Default Charge Type** selection to “Yes” (see the Edit Animal Order Charge Type section of this manual),



then navigate back to the **Add Charge Item** popup, recreate the desired record and click **Save**.



If the **Start Date** entered is in the past, a confirmation popup dialog box appears.



Click **CANCEL** to close the confirmation popup and return to the **Add Charge Item** popup.

Click **CONFIRM** to save the record and close both the confirmation and **Add Charge Item** popups.

The record is added/revised on the **Setup Animal Orders - Charge Items** page.

My Workspaces		Vivarium	Setup Animal Orders - Charge Items					Add a New Charge Item	
Edit	Default	Show History	Charge Item	Start Date	End Date	Cost	Hide from Dropdown List?	Modified By	
	No		Mice (50)	02/26/2019	02/24/2020	65.00	No	Administrator	
	No		Rats (50)	03/08/2019	03/28/2019	75.00	No	Administrator	
	No		Guinea Pigs (25)	03/08/2019	03/17/2021	52.00	No	Administrator	
	Yes		Mice (100)	10/01/2019	10/01/2020	100.00	No	Administrator	

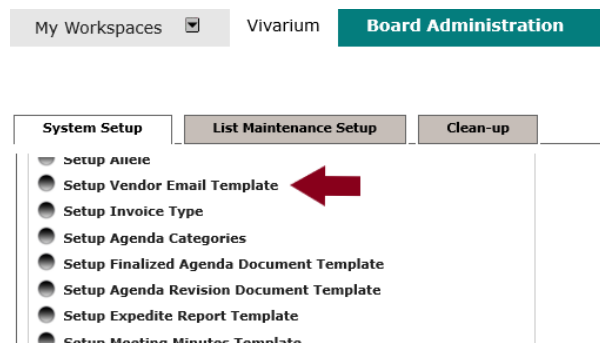
Setup Vendor Email Template

The iRIS™ system provides tools for configuration of boilerplate vendor email templates that can be customized as needed when creating an email to be sent to a vendor.

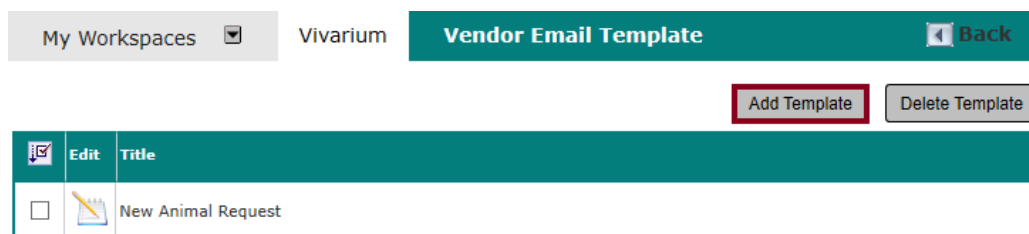
In addition to boilerplate text and formatting, system Merge Codes can be added to vendor email templates to include identifying subject animal details, order details, and other relevant data pulled from the iRIS™ system.

Add Vendor Email Template

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Vendor Email Template** link.



The **Vendor Email Template** page opens. Click the **Add Template** button.



A text editor panel is opened for creation of the new template.

Enter a **Title**. The title should be descriptive or meaningful enough to convey the purpose of the template.

The **Content** section contains a text editor with standard text editing and formatting tools. Enter the desired boilerplate text, leaving spaces open for insertion of Merge Codes where applicable.

In the screenshot below a **Vendor Email Template** has been created to address the problem of incorrect sex counts in a livestock order. Empty spaces are left open where Merge Codes are to be inserted.

Merge Codes are used to pull data from iRIS™ records into documents, templates, forms and system webpages. Merge Codes are selected from a picklist, there is no need to write or edit any programmatic code to use Merge Codes.

Insert Merge Codes in Vendor Email Template

To insert a Merge Code in a **Vendor Email Template**, place the cursor in the text editor where you want the corresponding data value to appear, then click the **Insert Merge Code** button to open the Merge Codes picklist.

My Workspaces ▾ Vivarium **Vendor Email Template** Back

Insert Merge Code Save Template

*Title: Animal Return, Incorrect Sex Counts

*Content:

Dear ,

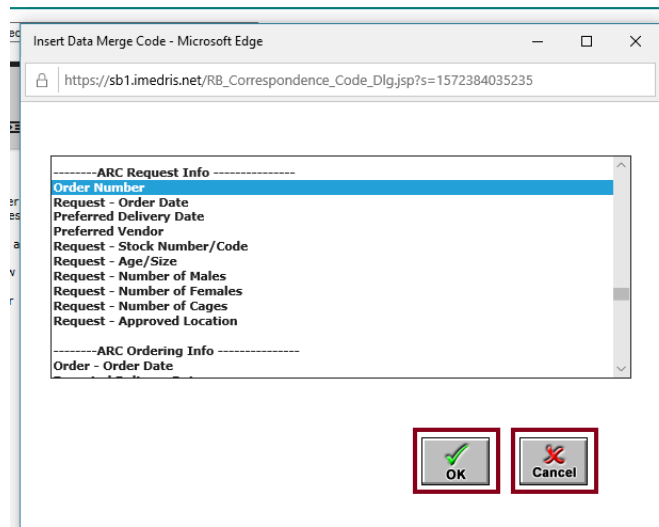
Our livestock order number | was received on . Unfortunately, the sex counts of these animals are incorrect. Our order was for females and males, but we received females and males.

We have sent the animals back and a new order was sent .

Please let us know if you need any more information regarding this order.

- ARC Coordinator

The **Insert Data Merge Code** popup window displays. Scroll down to the sections of the list labeled for ARC and select the desired Merge Code. In this example, the Merge Code for “Order Number” is selected.



Click the **Cancel** button to close the popup without inserting the Merge Code.

Click the **OK** button to insert the Merge Code. The selected Merge Code is inserted in the template at the cursor location.

My Workspaces ▾ Vivarium **Vendor Email Template** [Back](#)

[Insert Merge Code](#) [Save Template](#)

***Title:** Animal Return, Incorrect Sex Counts

***Content:**

Dear ,

Our livestock order number [%order_num%] was received on . Unfortunately, the sex counts of these animals are incorrect. Our order was for females and males, but we received females and males.

We have sent the animals back and a new order was sent .

Please let us know if you need any more information regarding this order.

- ARC Coordinator

In the screenshot below, Merge Codes for “Vendor Name”, “Order Number”, “Date Received”, “Order - Number of Females”, “Order - Number of Males”, “Receive – Number of Females”, “Receive – Number of Males”, and “Order – Order Date” are inserted.

My Workspaces ▾ Vivarium **Vendor Email Template** [Back](#)

[Insert Merge Code](#) [Save Template](#)

***Title:** Animal Return, Incorrect Sex Counts

***Content:**

Dear [%vendor_name%],

Our livestock order number [%order_num%] was received on [%received_date%]. Unfortunately, the sex counts of these animals are incorrect. Our order was for [%order_num_females%] females and [%order_num_males%] males, but we received [%receive_num_females%] females and [%receive_num_males%] males.

We have sent the animals back and a new order was sent [%order_order_date%].

Please let us know if you need any more information regarding this order.

- ARC Coordinator

Click the **Save Template** button to save the new record. The text editor closes and the template is added on the **Vendor Email Template** page.

My Workspaces Vivarium **Vendor Email Template** Back

Add Template Delete Template

		Title
☐		New Animal Request
☐		Animal Return, Incorrect Sex Counts

Merge Code List

Depending on the user's data access rights and the institution's Review Board Administration settings, the Merge Code list can include system data from the following categories:

Review Board	Study Financial Information
Meetings	Submission Information
Multi-Site	ARC Request Information
Study Personnel	ARC Ordering Information
Study Contacts	ARC Receiving Information
Form Creator	ARC Cage Information
Department Reviewer and Signoff	Study/IRB/IACUC Application Information

Most of the Merge Codes in the picklist are grouped under category titles. As shown in the screenshot below, category titles are offset by dashed lines. Selectable Merge Code items are indicated by blue boxes.

Insert Data Merge Code:

-----ARC Request Info-----

Order Number

Request - Order Date

Preferred Delivery Date

Preferred Vendor

Request - Stock Number/Code

Request - Age/Size

Request - Number of Males

Request - Number of Females

Request - Number of Cages

Request - Approved Location

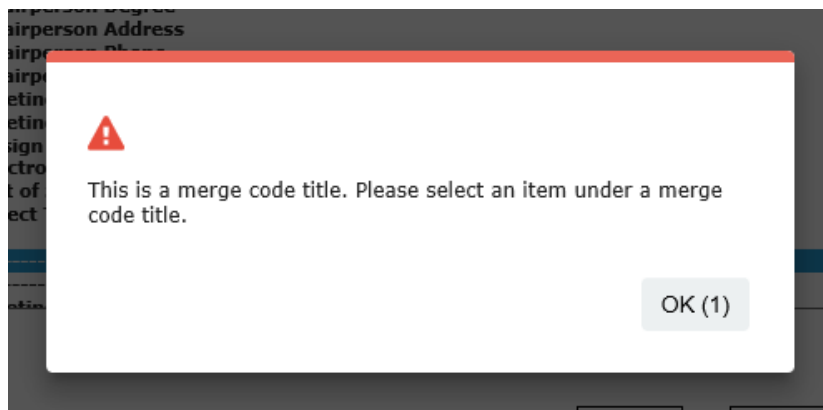
-----ARC Ordering Info-----

Order - Order Date

Expected Delivery Date

OK Cancel

Category titles are not Merge Codes and cannot be inserted in a template. If a title item is selected and the **OK** button is clicked, an error popup window displays.



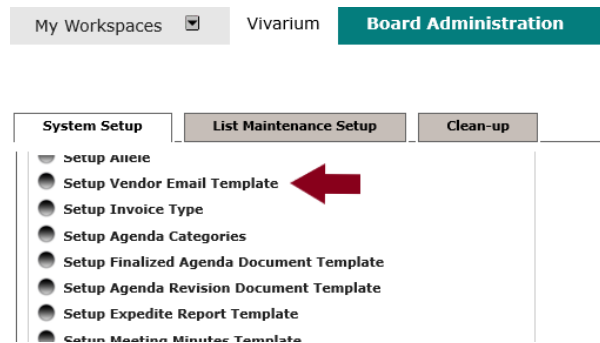
Merge Codes Applicable to ARC

Categories and Merge Codes from the list that are most applicable to ARC are summarized in the table below.

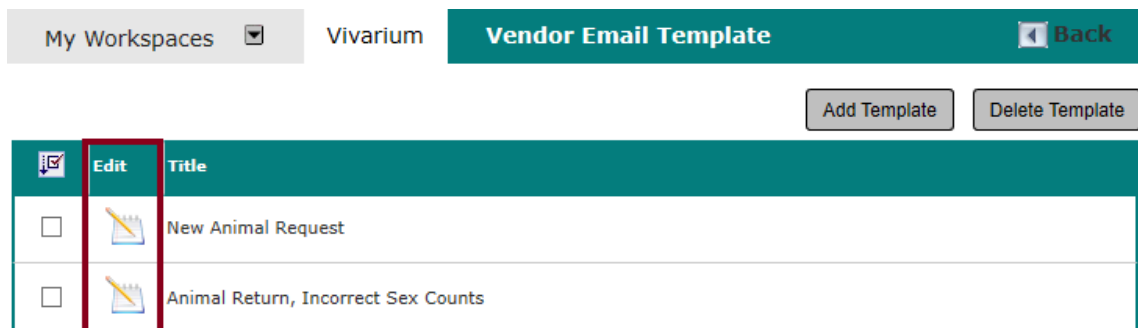
---ARC Request Info ---	---ARC Ordering Info ---	---ARC Receiving Info ---	---ARC Cage Info ---
Number of Females	Order - Order Date	Date Received	Cage Type
Number of Males	Expected Delivery Date	Purchase Cost	Bar Code
Age Size	Confirmation Number	Service Cost	Cage - Cage ID
Species Name	Method of Ordering	Container OK	Cage - Species
Strain Name	Vendor Name	General Appearance	Cage - Strain
Order Number	Vendor Contact	Eyes, Ears, Nose, Mouth	Cage - Number of Males
Request - Order Date	Vendor Phone	Urogenital, Anus	Cage - Number of Females
Preferred Delivery Date	Vendor Fax	Respiratory	Cage - Number of Unknown Sex
Preferred Vendor	Vendor Email	Hydration	Cage - Cage Card Comments
Request - Stock Number/Code	Order - Species	Receive - Number of Males	Cage - List of Animal IDs
Request - Age/Size	Order - Strain	Receive - Number of Females	
Request - Number of Males	Order - Stock Number/Code	Must go through Quarantine	
Request - Number of Females	Order - Age/Size	Receive - Number of Cages	
Request - Number of Cages	Order - Number of Males	Receive - Approved Location	
Request - Approved Location	Order - Number of Females		
	Order - Number of Cages		
	Order - Approved Location		

Edit Vendor Email Template

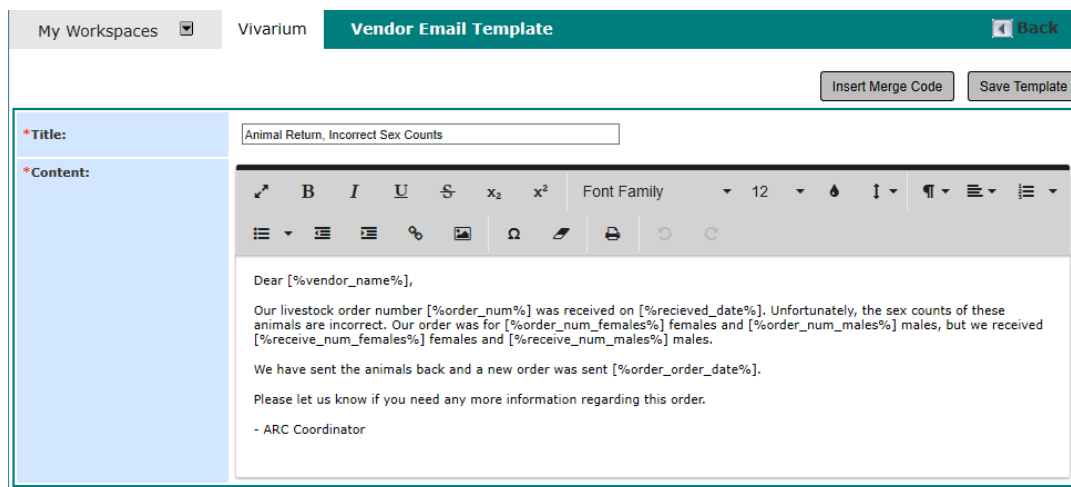
Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Vendor Email Template** link.



The **Vendor Email Template** page opens. Click the icon in the **Edit** column for the applicable record.



The template is opened in a text editor for editing.



Make desired changes to the template and click the **Save Template** button to save changes and close the text editor.

In the example below, some additional text and the Merge Code for “Receive - Approved Location” is added to the template.

My Workspaces Vivarium **Vendor Email Template** Back

Insert Merge Code **Save Template**

***Title:** Animal Return, Incorrect Sex Counts

***Content:**

Dear [%vendor_name%],

Our livestock order number [%order_num%] was received on [%recieved_date%]. Unfortunately, the sex counts of these animals are incorrect. Our order was for [%order_num_females%] females and [%order_num_males%] males, but we received [%receive_num_females%] females and [%receive_num_males%] males.

We have sent the animals back and a new order was sent [%order_order_date%]. Please arrange to have the new shipment delivered to [%receive_app_location%].

Let us know if you need any more information regarding this order.

- ARC Coordinator

For Merge Code instructions, see the *Insert Merge Codes in Vendor Email Template* section of this manual.

Delete Vendor Email Template

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Vendor Email Template** link.

My Workspaces Vivarium **Board Administration**

System Setup **List Maintenance Setup** Clean-up

- Setup Agenda
- Setup Vendor Email Template**
- Setup Invoice Type
- Setup Agenda Categories
- Setup Finalized Agenda Document Template
- Setup Agenda Revision Document Template
- Setup Expedite Report Template
- Setup Meeting Minutes Template

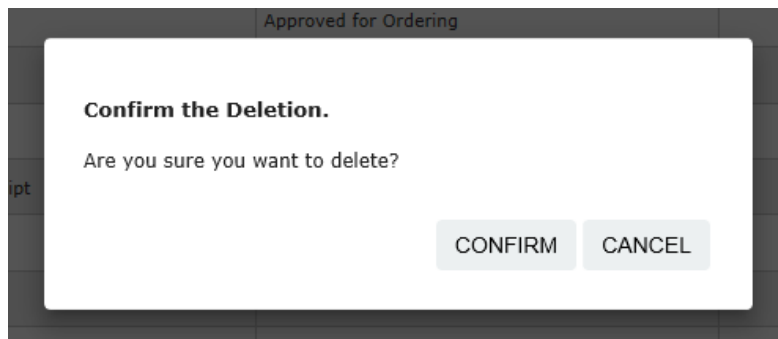
The **Vendor Email Template** page opens. Select the checkbox(es) in the far-left column for the template(s) to be deleted, then click the **Delete Template** button.

My Workspaces Vivarium **Vendor Email Template** Back

Add Template **Delete Template**

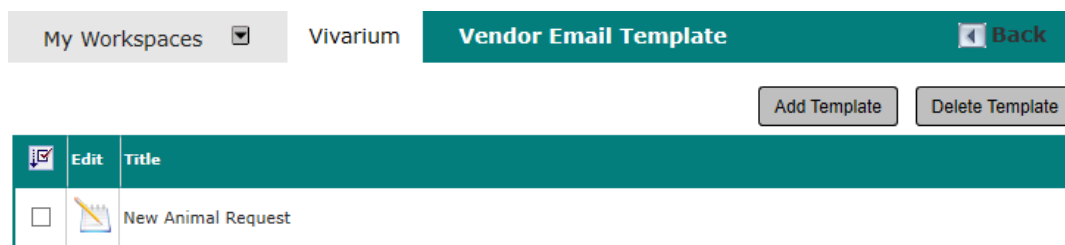
	Edit	Title
☐		New Animal Request
☒		Animal Return, Incorrect Sex Counts

A confirmation popup window displays.



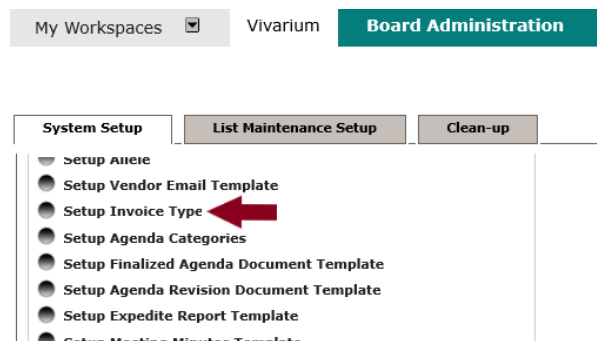
Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The template is deleted on the **Vendor Email Template** page.



Setup Invoice Type

ARC Invoice Types are configured on the **Setup Invoice Type** page. To access the page, navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Invoice Type** link.



The **Setup Invoice Type** page opens.

My Workspaces ▾ Vivarium **Setup Invoice Type** [Back](#)

[Add a New Invoice Type](#) [Delete Invoice Type\(s\)](#)

☒	Edit	Invoice Type
☐		Protocol Related Items
☐		Housing
☐		Supplies

Add Invoice Type

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Invoice Type** link.

My Workspaces ▾ Vivarium **Board Administration**

System Setup | **List Maintenance Setup** | **Clean-up**

- Setup Agenda
- Setup Vendor Email Template
- Setup Invoice Type**
- Setup Agenda Categories
- Setup Finalized Agenda Document Template
- Setup Agenda Revision Document Template
- Setup Expedite Report Template
- Setup Meeting Minutes Template

The **Setup Invoice Type** page opens. Click the **Add a New Invoice Type** button.

My Workspaces ▾ Vivarium **Setup Invoice Type** [Back](#)

[Add a New Invoice Type](#) [Delete Invoice Type\(s\)](#)

☒	Edit	Invoice Type
☐		Protocol Related Items
☐		Housing
☐		Supplies

An add panel is opened for creation of the new record.

My Workspaces ▾ Vivarium **Setup Invoice Type** [Back](#)

[Save Invoice Type](#)

*Invoice Type:

Enter an **Invoice Type** and click the **Save Invoice Type** button to save the record. The record is added on the **Setup Invoice Type** page.

My Workspaces ▾ Vivarium **Setup Invoice Type** [Back](#)

[Add a New Invoice Type](#) [Delete Invoice Type\(s\)](#)

☒ Edit	Invoice Type
☐	Protocol Related Items
☐	Housing
☐	Supplies
☐	Food

Edit Invoice Type

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Invoice Type** link.

My Workspaces ▾ Vivarium **Board Administration**

System Setup | List Maintenance Setup | Clean-up

- Setup Agenda
- Setup Vendor Email Template
- Setup Invoice Type 
- Setup Agenda Categories
- Setup Finalized Agenda Document Template
- Setup Agenda Revision Document Template
- Setup Expedite Report Template
- Setup Meeting Minutes Template

The **Setup Invoice Type** page opens. Click the icon in the **Edit** column for the applicable record.

My Workspaces ▾ Vivarium **Setup Invoice Type** [Back](#)

[Add a New Invoice Type](#) [Delete Invoice Type\(s\)](#)

☒ Edit	Invoice Type
☐	Protocol Related Items
☐	Housing
☐	Supplies
☐	Food

The record is opened in an edit panel.

My Workspaces ▾ Vivarium **Setup Invoice Type** [Back](#)

[Save Invoice Type](#)

*Invoice Type:

Make desired changes to the **Invoice Type** and click the **Save Invoice Type** button to save the record. The record is revised on the **Setup Invoice Type** page.

	Edit	Invoice Type
☐		Protocol Related Items
☐		Housing
☐		Supplies
☐		Dry Goods Food

Delete Invoice Type

Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Invoice Type** link.

My Workspaces Vivarium **Board Administration**

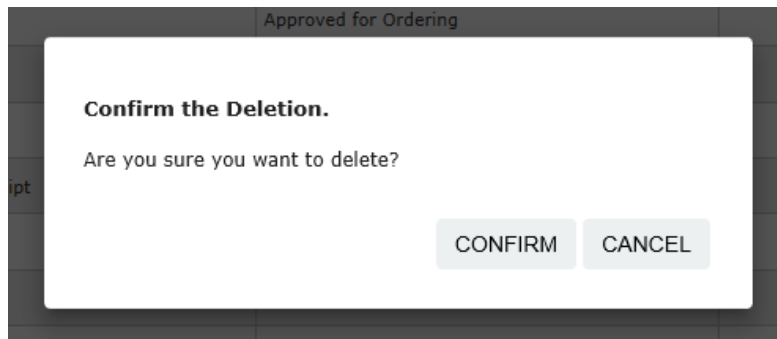
System Setup | List Maintenance Setup | Clean-up

- Setup Agenda
- Setup Vendor Email Template
- Setup Invoice Type**
- Setup Agenda Categories
- Setup Finalized Agenda Document Template
- Setup Agenda Revision Document Template
- Setup Expedite Report Template
- Setup Meeting Minutes Template

The **Setup Invoice Type** page opens. Select the checkbox(es) in the far-left column for the record(s) to be deleted, then click the **Delete Invoice Type(s)** button.

	Edit	Invoice Type
☐		Protocol Related Items
☐		Housing
☐		Supplies
☒		Dry Goods Food

A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The **Invoice Type** is deleted on the **Setup Invoice Type** page.

My Workspaces ▾

Vivarium

Setup Invoice Type [Back](#)

[Add a New Invoice Type](#) [Delete Invoice Type\(s\)](#)

	Edit	Invoice Type
☐		Protocol Related Items
☐		Housing
☐		Supplies