



ARC ASSISTANT

Animal Resource Center: Review Board Administration

Version 10.03.02

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ARC Assistant – Review Board Administration

This manual details the ARC-specific configurations available under ARC Assistant > Review Board Administration.





System Setup

On the System Setup tab of Review Board Administration, you can configure many aspects of ARC, from setting up animal facilities to configuring notifications.



Review Board System Setup


Setup Order Status

The ARC Order Status screen displays a listing of the ARC order statuses in the system. There are several hard-coded order statuses: Draft, New Response, Pending Approval, Approved for Ordering, Ordered – Pending Receipt, In Quarantine, Completed and Denied.

| ARC Order Status Back | | | | | |
|---|---|--|-----------------------|--|---|
| | | + Add a new order status | | ✖ Delete the selected order status | |
| 8 result(s) found... | | | | | |
|  | Edit | Order Status | Order Status Queue | Sort Order | Color |
| |  | Draft | Unknown | 1 |  |
| |  | New Request | Approved for Ordering | 2 |  |
| |  | Pending Approval | Pending Approval | 3 |  |
| |  | Approved for Ordering | Approved for Ordering | 4 |  |
| |  | Ordered - Pending Receipt | In Progress Orders | 5 |  |
| |  | In Quarantine | In Quarantine | 6 |  |
| |  | Completed | Completed | 7 |  |
| |  | Denied | Denied | 8 |  |

You can see the name of the status in the Order Status column. The Order Status Queue column displays the queue in which an order with the corresponding status will be placed under ARC Assistant > Orders. For example, you can find orders with a status of “New Request” in the “Approved for Ordering” queue.

| ARC - Orders Back | | | | | | | | | | | | | |
|---|--------------|---------------------------------------|--------------|----------------------------------|---------------------------|------------------------------------|-------------------------|--|--|---------------------------|--|--------------------------------|--|
| | | Approved for Ordering | | Pending Approval | | In Progress Orders | | Quarantine | | Completed | | Print Friendly | |
| 15 result(s) found... | | | | | | | | 1 - 10  | | | | | |
| Open | Order Status | IACUC Number / Study Title | Order Number | Principal Investigator | Requested Item | Total Requested | Date Board Received | | | | | | |
|  | New Request | Mouse Study | | | | | | | | | | | |
| | | IACUC-2016-0612 | ORD-16-062 | Investigator, Jane, M.D. | Mouse - (Mer-Cre-Mer) Cre | 5 | 12/21/2016 02:58 PM PST | | | | | | |

Click the  icon in the Edit column to view the details of an order status.

ARC Order Status ◀ Back

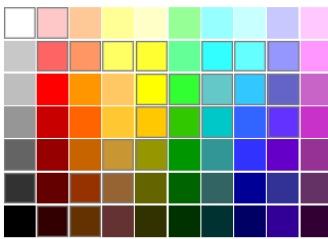
Save the project status

***Order Status:** New Request

***Order Status Queue:** Approved for Ordering

***Sort Order:**

Color:



Because this status is hard-coded, you will only be able to change the Sort Order and the associated color. The Sort Order controls the order of the list of statuses, both on the ARC Order Status screen and when the statuses appear in a dropdown list (for example, if you are adding a status in the order form’s workflow). When you are finished making any changes, click **Save the project status**.

Setup Order Numbering

This feature is used to set up automated numbers for animal orders. This is where you will configure the auto-generated order number sequencing.

Setup Order Numbering ◀ Back

Save Numbering

| Use in Number | Description of Number Part | Number Part Information | Separator |
|-------------------------------------|----------------------------|--|-----------|
| <input checked="" type="checkbox"/> | Constant Prefix | <input type="text" value="ORD"/> | - |
| <input checked="" type="checkbox"/> | Calendar Year | <input type="radio"/> All 4 digits <input checked="" type="radio"/> Last 2 digits | - |
| <input checked="" type="checkbox"/> | System Generated Number | <input type="text" value="71"/> <input checked="" type="checkbox"/> Zero Pad the Sequence Number Number of Digits <input type="text" value="3"/> | |

To set up variables in automated order numbers, check the box in the Use in Number column. In this case, Constant Prefix, Calendar Year, and System Generated Number are being used to create the order number. These are listed in the second column, Description of Number Part. The next column, Number Part Information, is where data values are given to the auto-generated number. The last column, Separator, specifies which separator to use between the chosen number parts.

The Constant Prefix will begin all animal orders with the prefix specified under Number Part Information. It will be followed by a separator (-), as indicated in the Separator column. The Calendar Year will use the year, displaying either all four digits, or only the last two, depending on which is selected. The last row indicates that a System Generated Number will be used. The first text box is used to specify where the number should begin. Check “Zero Pad the Sequence Number” to add zeroes to the system-generated number. The selected number will increase each time a new order number is created. The Number of Digits specified indicates how many digits will be used. In this case, the auto-

generated number will start at ORD-17-071, and increase one digit each time a new order is created, e.g. ORD-17-072, ORD-17-073, and so on. When you are finished configuring your numbering, click the **Save Numbering** button.

Setup Transfer Numbering

This feature is used to set up automated numbers for animal transfers. This is where you will configure the auto-generated transfer number sequencing.

| Setup Order Numbering | | | |
|-------------------------------------|----------------------------|---|-----------|
| Use in Number | Description of Number Part | Number Part Information | Separator |
| <input checked="" type="checkbox"/> | Constant Prefix | TRN | - |
| <input checked="" type="checkbox"/> | Calendar Year | <input type="radio"/> All 4 digits <input checked="" type="radio"/> Last 2 digits | - |
| <input checked="" type="checkbox"/> | System Generated Number | 33 <input checked="" type="checkbox"/> Zero Pad the Sequence Number Number of Digits <input type="text" value="3"/> | |

To set up variables in automated transfer numbers, check the box in the Use in Number column. In this case, Constant Prefix, Calendar Year, and System Generated Number are being used to create the transfer number. These are listed in the second column, Description of Number Part. The next column, Number Part Information, is where data values are given to the auto-generated number. The last column, Separator, specifies which separator to use between the chosen number parts.

The Constant Prefix will begin all animal transfers with the prefix specified under Number Part Information. It will be followed by a separator (-), as indicated in the Separator column. The Calendar Year will use the year, displaying either all four digits, or only the last two, depending on which is selected. The last row indicates that a System Generated Number will be used. The first text box is used to specify where the number should begin. Check “Zero Pad the Sequence Number” to add zeroes to the system-generated number. The selected number will increase each time a new order number is created. The Number of Digits specified indicates how many digits will be used. In this case, the auto-generated number will start at TRN-17-033, and increase one digit each time a new order is created, e.g. TRN-17-044, TRN-17-045, and so on.

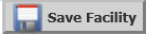
Setup Facilities/Floors/Rooms

This menu option will allow you to configure the facilities where your animals will be housed. You can set up facilities and then define floors and rooms for animal housing.

| System Administration - Setup Facilities/Floors/Rooms | | | | |
|---|------|---------------------------|----------------------------|-----------------------|
| | | | Back | |
| | | Add a New Facility | Delete Selected Facilities | |
| <input checked="" type="checkbox"/> | Edit | Facility Name | Facility Code | Total Number of Rooms |
| <input type="checkbox"/> | | Animal Housing Facility | | 2 |
| <input type="checkbox"/> | | Animal Housing Facility 2 | | 2 |

When you open the Setup Facilities/Floors/Rooms screen, you may see a list of facilities that have already been configured in your system. Click **Add a New Facility** to add a new facility record to the system. When the new screen opens, the only section initially visible is the **Facility** section. In this section, the only required field is the Facility Name.

System Administration - Setup Facilities/Floors/Rooms ◀ Back

Facility 

| | |
|------------------|---------------------------|
| Facility Code: | 12345 |
| *Facility Name: | Animal Housing Facility 3 |
| Street1: | 123 Main St |
| Street2: | |
| City: | Redlands |
| County/Parish: | San Bernardino |
| State: | CA: California |
| Province: | |
| Country: | USA: UNITED STATES |
| Zip/Postal Code: | 92373 |


You can also enter a Facility Code and the address for the facility. Once you have entered the facility information, click the **Save Facility** button. This will populate the **Facility Floors** and **Facility Rooms** sections of the screen.

To add a floor to the facility, click the **Add Floors** button. The Setup Floor pop-up window will open, allowing you to enter a floor in the Floor field.

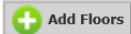
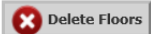

Setup Floor x

Facility : Animal Facility 3

*Floor: x



Click **Save Floor** to add the floor to the facility.

| Facility Floors | |  Add Floors |  Delete Floors |
|--------------------------|---|--|---|
| | Edit | Floor | |
| <input type="checkbox"/> |  | 1 | |

To add a room to the facility, click **Add Rooms**. The Setup Room pop-up window will open.

Setup Room X

Facility : Animal Housing Facility 3

*Room:

*Room Size (Sq. Ft):

Room Use:

Room Description:

Quarantine Use: Yes No

Room Status:

In this window, Room (room number) and Room Size (Sq. Ft.) are required fields. You can also enter information in the Room Use and Room Description fields. You will need to set the Quarantine Use flag to Yes if you wish the room to be designated for quarantined animals. You can also select between Active and Inactive in the Room Status dropdown menu. When you are finished entering details for the room, click **Save Room**.

| Facility Rooms | | Add Rooms | Delete Rooms |
|--------------------------|------|-----------|--------------|
| | Edit | Room | Size(Sq.Ft) |
| <input type="checkbox"/> | | 100 | 400 |

To delete a floor or room that has already been created, check the box next to the record and click the corresponding Delete button (**Delete Rooms** or **Delete Floors**).

When you are finished setting up your facility, floors, and rooms, click **Save Facility Changes**, and then click **Back** to return to the previous screen.

To view an existing facility, click the icon in the Edit column. You will be brought to a screen listing the facility and its associated floors and rooms.

System Administration - Setup Facilities/Floors/Rooms Back

Facility

Facility Code:

*Facility Name:

Street1:

Street2:

City:

County/Parish:

State:

Province:

Country:

Zip/Postal Code:

Facility Floors Add Floors Delete Floors

| | Edit | Floor |
|--------------------------|------|-------|
| <input type="checkbox"/> | | 1 |
| <input type="checkbox"/> | | 2 |
| <input type="checkbox"/> | | 3 |

Facility Rooms Add Rooms Delete Rooms

| | Edit | Room | Size(Sq.Ft) |
|--------------------------|------|------|-------------|
| <input type="checkbox"/> | | | |

When editing a facility, you can add or edit facility information, floors, and rooms as described above. Be sure to click **Save Facility Changes** when you are finished editing.

To delete an existing facility or multiple facilities, check the box(es) next to the record(s) and click **Delete Selected Facilities**.

Setup Cage Status

The Setup Cage Status menu option allows you to view the hard-coded cage statuses in your system.

You will see four hard-coded options on this screen: Active, Quarantine, Retired, and Transferred. The “Yes” in the Reserved column indicates that these origin types are hard-coded and cannot be deleted or edited.

| ARC-Setup Cage Status ← Back | | | | | |
|---|------|---|----------|---|-------|
| | | + Add a New Cage Status | | ✖ Delete Cafe Status(s) | |
| <input type="checkbox"/> | Edit | Cage Status | Reserved | Allow Edits | Color |
| <input type="checkbox"/> | | Active | Yes | Yes | |
| <input type="checkbox"/> | | Quarantine | Yes | No | |
| <input type="checkbox"/> | | Retired | Yes | No | |
| <input type="checkbox"/> | | Transferred | Yes | No | |

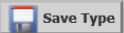
Setup Cage Types

When setting up cage types in ARC, you can define the associated species, the size of the cage, the maximum number of animals per cage, and whether to calculate per diem by cage or by animals per cage. When you first open the Setup Cage Types menu item, if cage types have already been created in your system, you will see the table of existing cage types.

| ARC-Setup Cage Types ← Back | | | | | | |
|--|------|---------------------------------------|---------|---------------------------------------|-----------------------|-------------|
| | | + Add a New Cage Type | | ✖ Delete Cage Type(s) | | |
| <input type="checkbox"/> | Edit | Cage Type | Species | Size(Floor Space) | Max. Animals Per Cage | Per Diem by |
| <input type="checkbox"/> | | Mouse Cage | Mouse | 100.00 | 4 | Cage |

To add a new cage type, click the **Add a New Cage Type** button.

◀ Back

 Save Type

| | |
|--------------------------------|---------------------------------------|
| *Cage Type: | <input type="text"/> |
| *Species: | <input type="text" value="--none--"/> |
| *Cage Size: | <input type="text"/> |
| *Max. Animals Per Cage: | <input type="text"/> |
| *Per Diem By: | <input type="text" value="Cage"/> |

The fields on this screen are as follows:

Cage Type: Enter the name of your new cage type in this text field.


Species: You can select from the species configured in your system from this dropdown list.

Cage Size: Enter the cage size here.


Max. Animals Per Cage: Enter a numerical value here representing the maximum number of animals the cage can hold.

Per Diem By: In this dropdown menu, select from between Cage and Animal. When Cage is selected, the per diem rate for the cage type will be one standard rate, regardless of the number of animals housed in the cage. When Animal is selected, the per diem rate will be calculated according to the number of animals in the cage.

When you are finished entering information, click **Save Type** to return to the previous screen.

To edit an existing cage type, click the  icon in the Edit column. You will be able to edit the fields described above.

◀ Back

 Save Type

| | |
|--------------------------------|---|
| *Cage Type: | <input type="text" value="Mouse Cage"/> |
| *Species: | <input type="text" value="Mouse"/> |
| *Cage Size: | <input type="text" value="100.00"/> |
| *Max. Animals Per Cage: | <input type="text" value="4"/> |
| *Per Diem By: | <input type="text" value="Cage"/> |

Remember to click **Save Type** when you are finished.

To delete an existing cage type(s) from the main page of cage type records, check the box(es) next to the cage type(s) you wish to delete and click **Delete Cage Type(s)**. A pop-up will display, asking you to confirm the deletion. Click **OK** to proceed or **Cancel** to return without deleting.

Setup Cage Card Template

When you first open the ARC – Review Board Cage Card Template screen, you will see a list of the cage cards, if any, that have already been created in the system.

ARC - Review Board Cage Card Template ◀ Back

+ Add a New Template
✖ Delete Selected Template(s)

List of cage card templates

5 result(s) found...

| | Edit | Title | Last Modified by | Date Modified |
|--------------------------|------|------------------|-------------------|---------------|
| <input type="checkbox"/> | | Cage Information | Jane Investigator | 01/09/2017 |

To add a new cage card template, click the **Add a New Template** button. You will be brought to a screen where you can set up the template. The Microsoft Word editor on this screen is a plug-in that is only available in Internet Explorer.

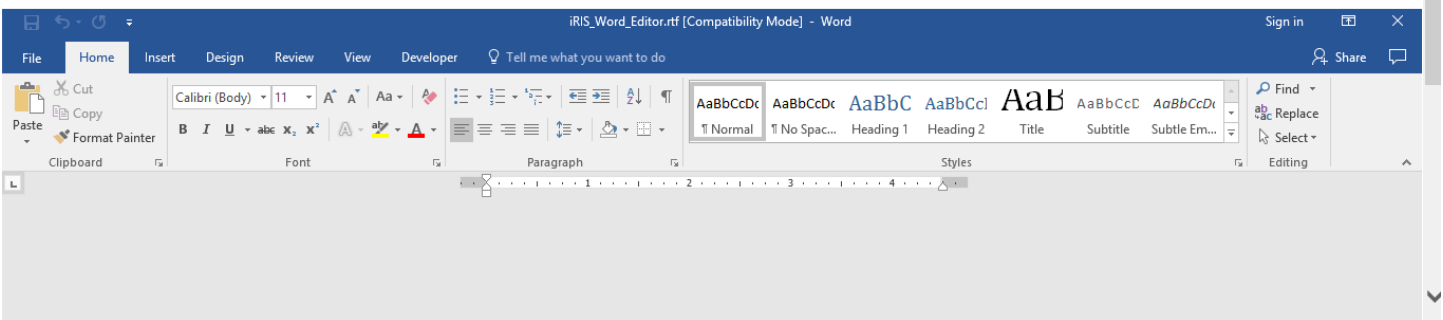
ARC - Review Board Cage Card Template ◀ Back

Barcode Settings
 Insert Merge Codes
 Save the Letter Template

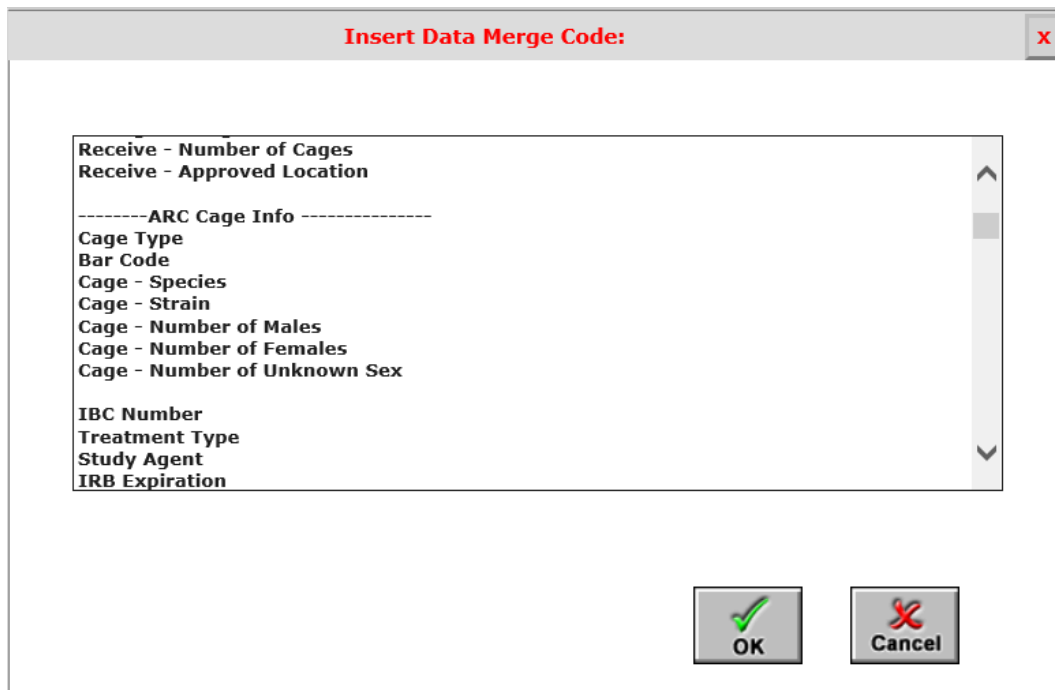
Edit a letter template.

* Title:

Comments:



Enter a Title for your template and any comments, if desired. You can edit the cage card template using the features of the editor and by inserting merge codes, which will pull in information when the cage card is generated. Position your cursor where you would like the merge code to be inserted, and click the **Insert Merge Codes** button. The Insert Data Merge Code window will open, as shown below.

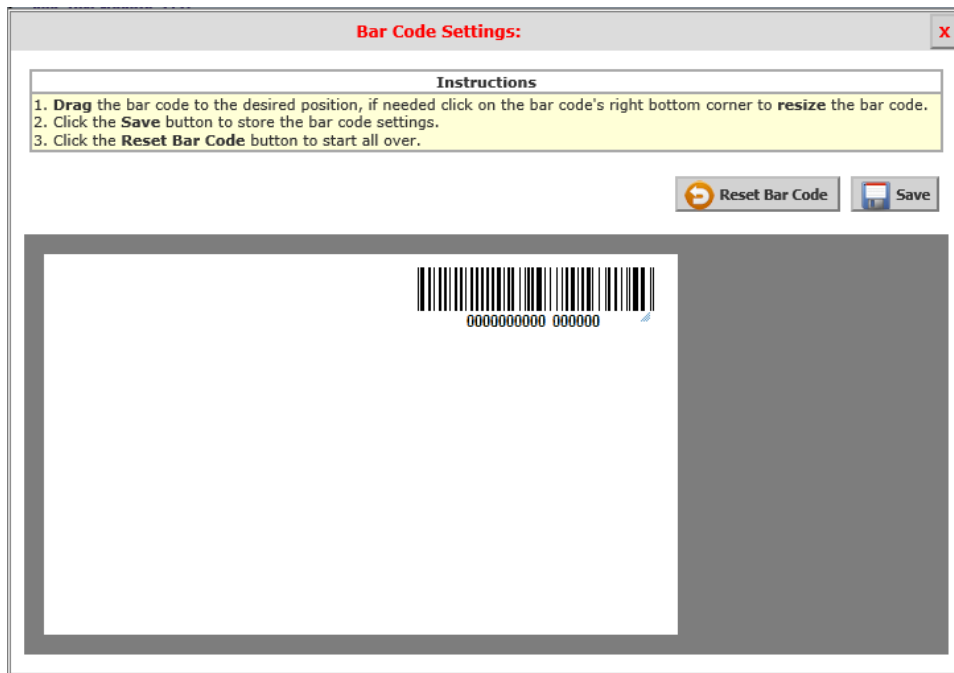


Select the merge code you wish to insert, and click OK. The merge code will be added to the document in the location where you placed your cursor.



In the example given above, the merge code will populate with the actual name of the species in the cage when the cage card is generated.

Click the **Barcode Settings** button if you wish to change the size and/or position of the barcode on your cage cards.



You can grab the barcode with your mouse and pull it to the desired location on the card. Click and drag the arrow in the barcode’s lower right-hand corner to resize the barcode. If you would like to move the barcode back to its original location before you have saved, click **Reset Bar Code**. To save the barcode’s position on the card and return to the previous screen, click **Save**.

When you are finished editing your cage card template, click the **Save the Letter Template** button.

After returning to the main list of cage card templates, click the icon in the Edit column to open and edit an existing template. To delete template(s), check the box(es) next to the desired template(s) and click the **Delete Selected Template(s)** button.

Setup Per Diem Definitions and Rates

The Setup Per Diem Definitions and Rates menu option allows you to define per diem effective dates and rates for the different types of cages in your system. If any per diem dates have already been defined, you will see them in a table listing the Cage Type, Description, Per Diem Code, Effective Date, and Rate.

| Per Diem Rate Setup | | | | | | | Back |
|--------------------------|------|-------------|-----------------|---------------|----------------|---------|---|
| | | | | | | | + Add a Rate ✖ Delete Selected Rate(s) |
| 3 result(s) found... | | | | | | | |
| <input type="checkbox"/> | Edit | Cage Type | Description | Per Diem Code | Effective Date | Rate | |
| <input type="checkbox"/> | | Dog Cage | Dog Per Diem | DOG_DIEM | 07/05/2016 | \$20.00 | |
| <input type="checkbox"/> | | Gerbil Cage | Gerbil Per Diem | GER_DIEM | 07/03/2016 | \$1.00 | |
| <input type="checkbox"/> | | Mouse Cage | Mouse Per Diem | MOUSE_DIEM | 05/10/2016 | \$2.00 | |

Click **Add a Rate** to set up a new per diem rate in the system.

Per Diem Rate Setup ◀ Back

+ Add a new Rate Details
Save Per Diem Rate

*Cage Type:

*Per Diem Code:

*Description:

Comments:

| Delete | *Effective Date | Ending Date | *Rate |
|--------|----------------------|-------------|-------------------------|
| | <input type="text"/> | | \$ <input type="text"/> |

When defining a per diem rate, you will be able to enter the following information:

Cage Type: In this dropdown menu, select from the cage types configured in the system. You should not select a cage type that already has a per diem rate configured.

Per Diem Code: Enter the code in this text field.

Description: Enter the description in this text field.

Effective Date: Enter the date here on which you would like per diem collection to begin.

Rate: Enter the daily rate here. When per diem is calculated for a cage, this rate may be applied per animal or per cage, depending on your system configurations.

If your per diem rates change over time, you may want to add a new rate that will start on a different date than the initial date you set up. Click **Add a new Rate Details**. This will create a new record in which you can add the date the new rate becomes effective as well as the new rate.

Add the new Effective Date and Rate, and click **Save Per Diem Rate**. As seen in the screenshot below, the ending date for the first per diem rate will be populated with the day before the new rate begins.

| Delete | *Effective Date | Ending Date | *Rate |
|--------|---|-------------|--------------------------------------|
| | <input type="text" value="01/10/2017"/> | 01/31/2017 | \$ <input type="text" value="5.00"/> |
| | <input type="text" value="02/01/2017"/> | | \$ <input type="text" value="6.00"/> |

In this case, the rate will be \$5.00 a day from 1/10/2017 through 1/31/2017. On 2/1/2017, the rate will increase to \$6.00/day.

Click **Save Per Diem Rate** to save the changes you have made and click **Back** to return to the previous screen. The new rate you have added will appear in the table of results.

To edit an existing rate, click the icon in the Edit column. To delete an existing rate(s), check the box(es) next to the corresponding record(s) and click **Delete Selected Rate(s)**.

Setup Veterinarian Profile

Under Setup Veterinarian Profile, you can designate users from the iRIS system as veterinarians. Animal internal transfers typically include a signoff by a veterinarian as a part of their workflow.

When you first open the page, a list of any veterinarians already designated in the system will populate.

| System Administration - Define Veterinarian Profiles ◀ Back | | | | | | | |
|---|------|----------------------------------|--------------|------------|-------------|--------------|-----------------|
| + Add a New Profile ✖ Delete Selected Profile(s) | | | | | | | |
| <input type="checkbox"/> | Edit | Default | ↕ Last Name | First Name | Employee ID | Phone | Email |
| <input type="checkbox"/> | | <input checked="" type="radio"/> | Veterinarian | Bob | 12345 | 909-555-1212 | vet@imedris.com |

The table of results lists the veterinarian’s first and last name, employee ID, phone number, and email address. If you have multiple veterinarians in your system, you can select the Default radio button next to a name to designate the vet who will automatically populate in your transfer forms.

To define a new veterinarian profile, click the **Add a New Profile** button. The Search User window will open, allowing you to search the iRIS directory. Enter all or part of the user’s name in the Last Name and First Name fields. You can also narrow down your results by selecting a Site from the dropdown list.

Search User: ✖

Last Name:

by Site:

First Name:

Find User/Search Directory

| Select | Name | Site | Email |
|--------|------------------------|----------|------------------|
| | Veterinarian, Bob | | vet@imedris.com |
| | Veterinarian, Veronica | Redlands | vvet@imedris.com |

Once you have identified the user you would like to add as a veterinarian, click the icon next to their name in the Select column. A view of the user’s profile will display, as seen below.

System Administration - Define Veterinarian Profiles ◀ Back

Save Profile

Employee ID: 33333
 Prefix:
 First Name: Veronica
 Middle Name:
 Last Name: Veterinarian
 Suffix:
 Street1:
 Street2:
 City:
 County/Parish:
 State:
 Province:
 Country:
 Zip/Postal Code:
 Phone:
 Fax:
 Email: vvvet@imedris.com

Click Save Profile, and the user will be added to the list of veterinarian profiles.

System Administration - Define Veterinarian Profiles ◀ Back

Add a New Profile Delete Selected Profile(s)

| | Edit | Default | Last Name | First Name | Employee ID | Phone | Email |
|--------------------------|------|----------------------------------|--------------|------------|-------------|--------------|-------------------|
| <input type="checkbox"/> | | <input checked="" type="radio"/> | Veterinarian | Bob | 12345 | 909-555-1212 | vet@imedris.com |
| <input type="checkbox"/> | | <input type="radio"/> | Veterinarian | Veronica | 33333 | | vvvet@imedris.com |

Click the icon in the Edit column to view a veterinarian’s user profile. To delete veterinarian profile(s), click the box(ex) next to their name(s) and click **Delete Selected Profile(s)**.

Setup Transfer Coordinator Profile

Under Setup Transfer Coordinator Profile, you can designate users from the iRIS system as Transfer Coordinators. Animal internal transfers typically include a signoff by a Transfer Coordinator as a part of their workflow.

When you first open the page, a list of any Transfer Coordinators already designated in the system will populate.

System Administration - Define Transfer Coordinator Profiles ◀ Back

Add a New Profile Delete Selected Profile(s)

| | Edit | Default | Last Name | First Name | Employee ID | Phone | Email |
|--------------------------|------|----------------------------------|----------------------|------------|-------------|--------------|----------------------|
| <input type="checkbox"/> | | <input checked="" type="radio"/> | Transfer Coordinator | Ann | 123456 | 909-555-1212 | transfer@imedris.com |

The table of results lists the coordinator’s first and last name, employee ID, phone number, and email address. If you have multiple Transfer Coordinators in your system, you can select the Default radio button next to a name to designate the user who will automatically populate in your transfer forms.

To define a new Transfer Coordinator profile, click the **Add a New Profile** button. The Search User window will open, allowing you to search the iRIS directory. Enter all or part of the user’s name in the Last Name and First Name fields. You can also narrow down your results by selecting a Site from the dropdown list.

Search User: X

Last Name:

by Department:

First Name:

Find User/Search Directory

| Select | Name | Department | Email |
|--------|---------------------------|------------|-----------------------|
| | Transfer Coordinator, Ann | Redlands | transfer@imedris.com |
| | Transfer Coordinator, Tom | Redlands | ttransfer@imedris.com |

Once you have identified the user you would like to add, click the icon next to their name in the Select column. A view of the user’s profile will display, as seen below.

System Administration - Define Transfer Coordinator Profiles ◀ Back

Save Profile

Employee ID:

Prefix:

First Name: Tom

Middle Name:

Last Name: Transfer Coordinator

Suffix:

Street1:

Street2:

City:

County/Parish:

State:

Province:

Country:

Zip/Postal Code:

Phone: 909-555-1212

Fax:

Email: ttransfer@imedris.com

Click Save Profile, and the user will be added to the list of Transfer Coordinator profiles.

System Administration - Define Transfer Coordinator Profiles ◀ Back













Add a New Profile
 Delete Selected Profile(s)

| | Edit | Default | Last Name | First Name | Employee ID | Phone | Email |
|--------------------------|------|----------------------------------|----------------------|------------|-------------|--------------|-----------------------|
| <input type="checkbox"/> | | <input checked="" type="radio"/> | Transfer Coordinator | Ann | 123456 | 909-555-1212 | transfer@imedris.com |
| <input type="checkbox"/> | | <input type="radio"/> | Transfer Coordinator | Tom | | 909-555-1212 | ttransfer@imedris.com |

Click the icon in the Edit column to view a Transfer Coordinator’s user profile. To delete Transfer Coordinator profile(s), click the box(ex) next to their name(s) and click **Delete Selected Profile(s)**.

Setup Generation

When you open the Setup Generation menu item, you will see a list of hard-coded generations already in the system. You will notice that the hard-coded generations do not have a checkbox to be deleted and say “Yes” in the Reserved column. You will not be able to make any edits to the hard-coded generations.

| ARC-Setup Generation ◀ Back | | | |
|---|------|------------|----------|
| + Add a New Generation ✖ Delete Generation(s) | | | |
|  | Edit | Generation | Reserved |
|  | | AAA | Yes |
|  | | F01 | Yes |
|  | | F02 | Yes |
|  | | N02 | Yes |
|  | | N03 | Yes |
|  | | N04 | Yes |
|  | | N05 | Yes |
|  | | N06 | Yes |
|  | | N07 | Yes |
|  | | N08 | Yes |
|  | | N09 | Yes |

Click **Add a New Generation** to create a custom generation. This will bring you to a screen where you can enter the name in the Generation field.

| ARC-Setup Generation ◀ Back | |
|--|--|
| Save Type | |
| *Generation: | <input type="text" value="Test Generation"/> |






After entering the name, be sure to click **Save Type**.

Setup Life Status

When you open the Setup Life Status menu item, you will see several hard-coded statuses already in the system: Alive, Dead, Euthanized, Killed, Missing, Transferred, and Shipped.

ARC-Setup Life Status ◀ Back

+ Add a New Life Status
✖ Delete Life Status(s)

|  | Edit | Life Status | Reserved | Allow Edits | Color | Animal in Use |
|---|------|-------------|----------|-------------|--|---------------|
|  | | Alive | Yes | Yes | | Yes |
|  | | Dead | Yes | No | | Yes |
|  | | Euthanized | Yes | No | | Yes |
|  | | Killed | Yes | No | | Yes |
|  | | Missing | Yes | Yes | | Yes |
|  | | Transferred | Yes | No | | Yes |
|  | | Shipped | Yes | No | | Yes |

Click the  icon in the Edit column to view the details of a life status.

ARC-Setup Life Status ◀ Back

 Save Type ^

***Life Status:**

Color:



Allow Edits: Yes No

Animal in Use: Yes No

The fields on this screen are as follows:

Life Status: Here, you can edit the name of the status.

Color: You can pick a color from the array of colors to represent the status.


Allow Edits: A “Yes” flag in this field indicates that you will be able to edit the animal’s record under Animal Management for a study.

Animal in Use: This flag determines whether an animal with this status will be counted when per diem is collected.

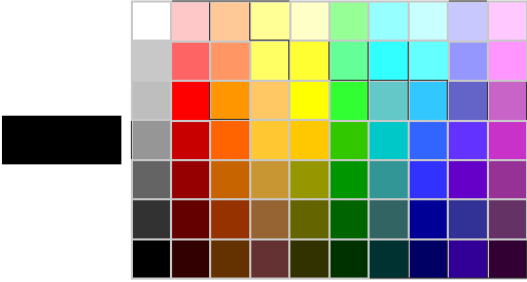
If you have made any edits to the life status, be sure to click the **Save Type** button, which will return you to the previous screen.

Click **Add a New Life Status** to add a custom status. You will be brought to the same screen as detailed above, with the ability to name the Life Status, set the color, and set values for the Allow Edits and Animal in Use flags. Click **Save Type** when you are done configuring the life status to save and return to the previous screen.

ARC-Setup Life Status ◀ Back

 Save Type

*Life Status:

Color: 











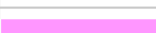






Allow Edits: Yes No

Animal in Use: Yes No

On the main page listing life statuses, note that the hard-coded statuses say “Yes” in the Reserved column. This indicates that these are hard-coded and cannot be deleted. If you have added a custom life status, you will see a checkbox in the first column in the table. Check the box and click **Delete Life Status(es)** to delete the status.

ARC-Setup Life Status ◀ Back

+ Add a New Life Status
✖ Delete Life Status(s)



|  | Edit | Life Status | Reserved | Allow Edits | Color | Animal in Use |
|---|---|-------------|----------|-------------|---|---------------|
| |  | Alive | Yes | Yes |  | Yes |
| |  | Dead | Yes | No |  | Yes |
| |  | Euthanized | Yes | No |  | Yes |
| |  | Killed | Yes | No |  | Yes |
| |  | Missing | Yes | Yes |  | Yes |
| |  | Transferred | Yes | No |  | Yes |
| |  | Shipped | Yes | No |  | Yes |
| <input checked="" type="checkbox"/> |  | Test Status | No | Yes |  | Yes |

Setup Coat Color

The Setup Coat Color menu option allows you to configure coat colors for animals that can be selected in the animal’s profile.

ARC-Setup Coat Color ◀ Back

+ Add a New Coat Color
✖ Delete Coat Color(s)

| | Edit | Species Name | Coat Color |
|--------------------------|---|--------------|---|
| <input type="checkbox"/> |  | Mouse |  |
| <input type="checkbox"/> |  | Mouse |  |

Click **Add a New Coat Color** to configure a new coat color for a species.


ARC-Setup Coat Color ◀ Back

Save Type

*Species:

Coat Color:

First, select a Species from the dropdown menu, which contains the list of species configured in your system. Next, select a Coat Color from the dropdown menu. Click **Save Type** to save the new coat color and return to the previous screen.

To edit an existing coat color, click the  icon in the Edit column. This will open the screen shown above, where you can edit the Species and Coat Color. Be sure to click **Save Type** to save your edits when you are done.


To delete existing coat color(s), check the box(es) next to the corresponding record(s) in the table of coat colors and click **Delete Coat Color(s)**.

Setup Diet

The ARC – Setup Diet page displays any diets for species that have already been configured in your system. An animal's diet can be added to its profile.


ARC-Setup Diet ◀ Back

+ Add a New Diet
✖ Delete Diet(s)

| | Edit | Species | Diet |
|--------------------------|---|---------|------------|
| <input type="checkbox"/> |  | Mouse | Mouse Food |

Click **Add a New Diet** if you wish to add a new diet to the system.

ARC-Setup Diet ◀ Back








*Species:


*Diet:

On this screen, you can select a Species from the dropdown list of species configured in your system. Enter the name of the new diet in the Diet text box. When you are finished, click **Save Diet** to save your changes and return to the previous screen. The new diet you have added will appear in the list of records.

ARC-Setup Diet ◀ Back

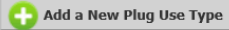

|  | Edit | Species | Diet |
|---|---|---------|--------------|
| <input type="checkbox"/> |  | Mouse | Mouse Food |
| <input type="checkbox"/> |  | Mouse | Special Diet |



To edit a diet, click the  icon in the Edit column. To delete diet(s), check the box(es) next to the corresponding record(s) and click **Delete Diet(s)**.

Setup Plug Use Type

When you first open the Setup Plug Use Type menu option, you will see a list of plug use types, if any, that have already been created in your system.


ARC-Setup Plug Use Type ◀ Back

|  | Edit | Species | Plug Use Type |
|---|---|---------|-----------------|
| <input type="checkbox"/> |  | Mouse | Plug Use Type 1 |

Click **Add a New Plug Use Type** to add a new record to the list. On the next screen, you will first be prompted to select a Species from a dropdown menu of all the species configured in your system. In the Plug Use Type field, enter the name of the plug use type.


ARC-Setup Plug Use Type ◀ Back



*Species:

*Plug Use Type:

Click **Save Plug Use Type** to save the information you have entered and return to the previous screen.


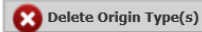
To edit an existing plug use type, click the  icon in the Edit column. You will be brought back to the screen shown above and can edit the Species and Plug Use Type fields.





To delete an existing plug use type, select the checkbox next to the corresponding record and click **Delete Plug Use Type(s)**.

Setup Origin Type

The Setup Origin Type menu option allows you to view the origins for animals, or the way they were added to a study (i.e., order, transfer, breeding).

ARC-Setup Origin Type ◀ Back



| <input checked="" type="checkbox"/> | Edit | Origin Type | Reserved |
|-------------------------------------|---|-------------------|----------|
| <input type="checkbox"/> |  | Order | Yes |
| <input type="checkbox"/> |  | Internal Transfer | Yes |
| <input type="checkbox"/> |  | External Transfer | Yes |
| <input type="checkbox"/> |  | Breeding | Yes |


You will see four hard-coded options on this screen: Order, Internal Transfer, External Transfer, and Breeding. The “Yes” in the Reserved column indicates that these origin types are hard-coded and cannot be deleted or edited.

Setup Observation Diagnosis

Observation diagnoses can be used when you are creating a new observation about an animal in the animal’s profile.

ARC-Setup Observation Diagnosis ◀ Back

| <input checked="" type="checkbox"/> | Edit | Diagnosis |
|-------------------------------------|---|-----------------------|
| <input type="checkbox"/> |  | Observation Diagnosis |

To add a new observation diagnosis, click the **Add a New Diagnosis** button. You will be brought to a screen where you can enter a Diagnosis in the corresponding text box.

ARC-Setup Observation Diagnosis Back

Save Diagnosis

*Diagnosis:

After entering information, click **Save Diagnosis** to save and return to the previous screen.

ARC-Setup Observation Diagnosis Back

Add a New Diagnosis Delete Diagnosis

| <input checked="" type="checkbox"/> | Edit | Diagnosis |
|-------------------------------------|------|-------------------------|
| <input type="checkbox"/> | | Observation Diagnosis |
| <input type="checkbox"/> | | Observation Diagnosis 2 |

To delete a diagnosis, check the box(es) next to the record(s) you wish to delete and click **Delete Diagnosis**.

You can select an Observation Diagnosis when adding an observation about an animal in Animal Management.

Add Observation X

Observed By: Susan Investigator

*Observation Date:

Problem/Diagnosis:

Treatment:

Outcome:

*Observation:


Cancel Save

Setup Observation Outcome

Observation outcomes can be used when you are creating a new observation about an animal in the animal’s profile.

ARC-Setup Observation Outcome ◀ Back

+ Add a New Outcome
✖ Delete Outcome

| | Edit | Outcome |
|--------------------------|---|---------------------|
| <input type="checkbox"/> |  | Observation Outcome |

To add a new observation outcome, click the **Add a New Outcome** button. You will be brought to a screen where you can enter an Outcome in the corresponding text box.

ARC-Setup Observation Outcome ◀ Back



Save Outcome

*Outcome:

After entering information, click **Save Outcome** to save and return to the previous screen.

ARC-Setup Observation Diagnosis ◀ Back

+ Add a New Diagnosis
✖ Delete Diagnosis

| | Edit | Diagnosis |
|--------------------------|---|-------------------------|
| <input type="checkbox"/> |  | Observation Diagnosis |
| <input type="checkbox"/> |  | Observation Diagnosis 2 |

To delete an outcome, check the box(es) next to the record(s) you wish to delete and click **Delete Outcome**.

You can select an Observation Outcome when adding an observation about an animal in Animal Management.

Add Observation X

Observed By: Susan Investigator

***Observation Date:** 01/11/2017 📅

Problem/Diagnosis: --none-- ▼

Treatment: --none-- ▼

Outcome: --none-- ▼

--none--
Observation Outcome
 Observation Outcome 2

***Observation:**

↶ Cancel 💾 Save

Setup Observation Treatment

Observation treatments can be used when you are creating a new observation about an animal in the animal’s profile.

⏪ Back

+ Add a New Treatment ✖ Delete Treatment

| | Edit | Treatment |
|--------------------------|------|-----------------------|
| <input type="checkbox"/> | | Observation Treatment |

To add a new observation treatment, click the **Add a New Treatment** button. You will be brought to a screen where you can enter a Treatment in the corresponding text box.

⏪ Back

💾 Save Treatment

***Treatment:**

After entering information, click **Save Treatment** to save and return to the previous screen.

ARC-Setup Observation Treatment ◀ Back

+ Add a New Treatment
✖ Delete Treatment

| | Edit | Treatment |
|--------------------------|------|-------------------------|
| <input type="checkbox"/> | | Observation Treatment |
| <input type="checkbox"/> | | Observation Treatment 2 |

To delete a treatment, check the box(es) next to the record(s) you wish to delete and click **Delete Treatment**.

You can select an Observation Treatment when adding an observation about an animal in Animal Management.

Add Observation ✖

Observed By: Susan Investigator

*Observation Date: 01/11/2017

Problem/Diagnosis: --none--

Treatment: --none--

Outcome:

- none--
- Observation Treatment
- Observation Treatment 2

*Observation:

↶ Cancel
💾 Save

Setup Breeding Status

The breeding status is added to a breeding record on a study to indicate the status of the animals that were born. When you first select the Setup Breeding Status menu option, you will see a list of any breeding statuses that have already been set up in your system.


ARC-Setup Breeding Status ◀ Back

+ Add a New Breeding Status
✖ Delete Breeding Status




| | Edit | Breeding Status |
|--------------------------|------|-----------------|
| <input type="checkbox"/> | | Alive |
| <input type="checkbox"/> | | Born Dead |
| <input type="checkbox"/> | | Dead at Weaning |
| <input type="checkbox"/> | | Killed |
| <input type="checkbox"/> | | Missing |

To add a new status, click the **Add a New Breeding Status** button. On the following screen, enter a new status in the Breeding Status field.

Click **Save Breeding Status** to save the status and return to the previous screen.

To edit an existing breeding status, click the  icon in the Edit column. You will be brought to the screen where you can edit the name of the breeding status as shown above. Click **Save Breeding Status** to retain your edits and return to the previous screen.

You can select a breeding status when creating a breeding record, as shown below.

| | | |
|------------------------------|--|---|
| Breeding Number: | <Generated on Save > | |
| * Mating ID | --none-- ▼ | |
| * Total Born # | 5 | |
| * # Males / # Females | 2 | / 3 |
| * Breeding Type | Live Birth ▼ | |
| * Date Born | 01/12/2017 |  |
| Wean Date | |  |
| Tag Date | |  |
| * Breeding Status | --none-- ▼ --none-- Alive Born Dead Dead at Weaning Killed Missing | |
| Comments | | |

Setup Breeding Type

You can select a breeding type when you are setting up a breeding record in a study. Clicking the Setup Breeding Type menu item will bring you to the list of breeding types that have already been set up in your system.

ARC-Setup Breeding Type ◀ Back

+ Add a New Breeding Type
✖ Delete Breeding Type(s)

| | Edit | Breeding Type |
|--------------------------|------|---------------|
| <input type="checkbox"/> | | Live Birth |

To add a new status, click the **Add a New Breeding Type** button. On the following screen, enter a new type in the Breeding Type field.

ARC-Setup Breeding Type ◀ Back

Save Breeding Type

*Breeding Type:

Click **Save Breeding Type** to save and return to the previous screen.












To edit an existing breeding type, click the icon in the Edit column. You will be brought to the screen where you can edit the name of the breeding type as shown above. Click **Save Breeding Type** to retain your edits and return to the previous screen.

You can select a breeding type when creating a breeding record, as shown below.

| | |
|------------------------------|--|
| Breeding Number: | <Generated on Save > |
| * Mating ID | <input style="width: 80px;" type="text" value="001"/> |
| * Total Born # | <input style="width: 80px;" type="text" value="5"/> |
| * # Males / # Females | <input style="width: 40px;" type="text" value="2"/> / <input style="width: 40px;" type="text" value="3"/> |
| * Breeding Type | <div style="border: 1px solid gray; padding: 2px;"> --none-- --none-- Breeding Type 2 Live Birth </div> |
| * Date Born | <input style="width: 80px;" type="text"/> |

Setup Gene


Genes are used when defining an animal’s genotyping under Animal Management. When you first open the Setup Gene menu item, you will be presented with a list of genes that have already been defined in your system, if any.

| ARC-Setup Gene | | | Back |
|--------------------------|---|---------|---|
| | | | <input type="button" value="+ Add a New Gene"/> <input type="button" value="X Delete Gene(s)"/> |
| <input type="checkbox"/> | Edit | Gene | |
| <input type="checkbox"/> |  | 18 | |
| <input type="checkbox"/> |  | 64 | |
| <input type="checkbox"/> |  | Ahr | |
| <input type="checkbox"/> |  | Ap3b1 | |
| <input type="checkbox"/> |  | Apoe4 | |
| <input type="checkbox"/> |  | Apoe KQ | |
| <input type="checkbox"/> |  | Apoe KO | |
| <input type="checkbox"/> |  | Aspe | |
| <input type="checkbox"/> |  | Awprla | |
| <input type="checkbox"/> |  | BloCla3 | |
| <input type="checkbox"/> |  | BWK | |


To add a new gene, click the **Add a New Gene** button. On the following screen, enter the gene name in the Gene field.

| ARC-Setup Gene | | Back |
|----------------|----------------------|--|
| | | <input type="button" value="Save Gene"/> |
| *Gene: | <input type="text"/> | |

Click **Save Gene** to save your entry and return to the previous screen.

To edit an existing gene, click the  icon in the Edit column. You will be brought to the screen where you can edit the name of the gene as shown above. Click **Save Gene** to retain your edits and return to the previous screen.

You can select a gene when setting up an animal's genotype, as shown below.

 **Genotyping - IACUC-2016-0612_M_00031**





| | |
|---------------------------|----------|
| *Gene: | --none-- |
| *First Allele: | 18 |
| *First Confidence: | 64 |
| Second Allele: | Ahr |
| Second Confidence: | Ap3b1 |
| *Genotype Date: | Apoe4 |
| Comments: | Apoe KQ |
| | Apoe KO |
| | Aspe |
| | Awprla |
| | BloCla3 |
| | BWK |
| | CNO |

Setup Allele

Alleles are used when defining an animal’s genotyping under Animal Management. When you first open the Setup Allele menu item, you will be presented with a list of alleles that have already been defined in your system, if any.

ARC-Setup Allele ◀ Back

+ Add a New Allele
✖ Delete Allele(s)

| <input type="checkbox"/> | Edit | Allele |
|--------------------------|---|--------|
| <input type="checkbox"/> |  | b-1 |
| <input type="checkbox"/> |  | b-2 |
| <input type="checkbox"/> |  | Mut |
| <input type="checkbox"/> |  | Wt |


To add a new allele, click the **Add a New Allele** button. On the following screen, enter the allele name in the Allele field.

ARC-Setup Allele ◀ Back


Save Allele

***Allele:**

Click **Save Allele** to save your entry and return to the previous screen.

To edit an existing allele, click the  icon in the Edit column. You will be brought to the screen where you can edit the name of the allele, as shown above. Click **Save Allele** to retain your edits and return to the previous screen.

You can select an allele when setting up an animal’s genotype, as shown below.

 **Genotyping - IACUC-2016-0612_M_00031**

*Gene: 18

*First Allele: --none--

*First Confidence: b-1 No

Second Allele: Mut

Second Confidence: Wt Yes No

*Genotype Date:

Comments:

Review Board Notification Setup

You can configure review board notifications that will email specified users within the system based on system actions.

Notifications can all be set up in the same way, by entering the content of the email and using merge codes to pull in specific information. Start by clicking the **Add Notification** button.

Internal Transfer Originating PI Signoff Notification Setup ◀ Back

| Edit | Type | Title | Send E-mail Notification | Action |
|------|---|-------------|--------------------------|---|
| | Internal Transfer Originating PI Signoff Notification Setup | Not Defined | Not Defined | + Add Notification |
| | Internal Transfer Originating PI Signoff Notification Setup Denial Notification | Not Defined | Not Defined | + Add Notification |

All notifications will require a Title. This will be the subject line of the email.

Internal Transfer Originating PI Signoff Notification Setup ◀ Back

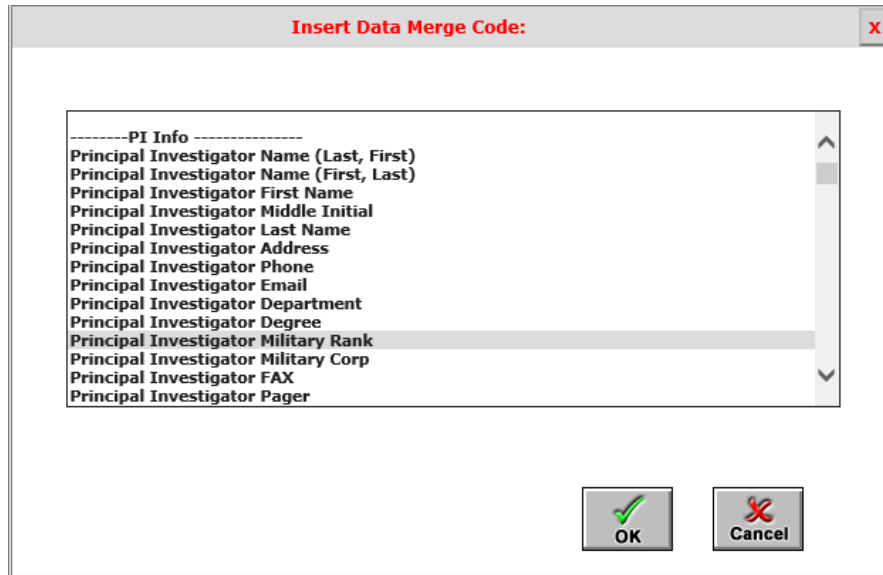
Insert Merge Code
Save Notification

| | |
|----------------------------------|---|
| Type of Notification: | Internal Transfer Originating PI Signoff Denial Notification |
| Title: | Internal Transfer Originating PI Signoff Denial |
| Send E-Mail Notification: | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| E-mail Content: | <div style="border: 1px solid gray; padding: 5px;"> <p>Dear [%pi_name1%]:</p> <p>We regret to inform you that your internal animal transfer request has been denied by the originating study's Principal Investigator.</p> </div> |

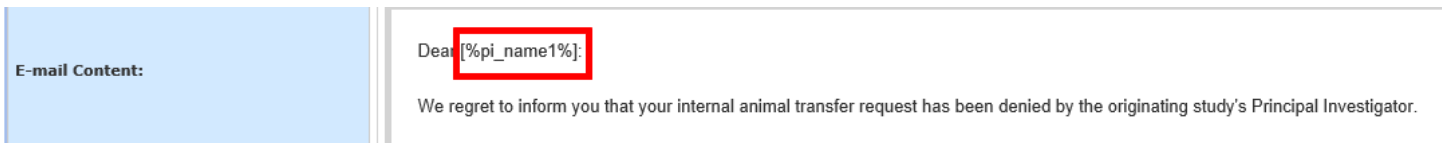
You can specify whether to send the email notification by selecting Yes or No in the Send E-Mail Notification column. If “Yes” is set, the notification will send to the recipient. If “No” is set, the notification will not send via email. However, the

recipient of the notification should still receive a home screen task and the notification can still be tracked within the system.

Within the E-Mail Content portion of the notification, you can enter the body of the email. You can type in or copy and paste text and use the system’s merge codes to pull in specific information when the notification is generated. Click the **Insert Merge Code** button and a small pop-up window will open, allowing you to select the merge code you wish to use.



For example, if you wanted the notification to populate with the name of the PI when the email is sent, you could select a Principal Investigator Name merge code.



Once a notification is added, the record will update with information related to how the notification was configured. The notification can be deleted, if necessary by clicking on the **Delete Notification** button. If you delete the notification, you can re-add the notification, but none of the information you previously added to the notification will be kept.

| Edit | Type | Title | Send E-mail Notification | Action |
|------|--|---|--------------------------|---------------------|
| | Internal Transfer Originating PI Signoff Notification Setup | Not Defined | Not Defined | Add Notification |
| | Internal Transfer Originating PI Signoff Denial Notification | Internal Transfer Originating PI Signoff Denial | Yes | Delete Notification |

Internal Transfer Originating PI Signoff Notification Setup

The notifications in this category are related to signoffs by the originating PI (from the study supplying the animals) on internal animal transfers.

Internal Transfer Originating PI Signoff Notification Setup

[Back](#)

| Edit | Type | Title | Send E-mail Notification | Action |
|------|--|---|--------------------------|---------------------|
| | Internal Transfer Originating PI Signoff Notification | Internal Transfer Originating PI Signoff Notification | Yes | Delete Notification |
| | Internal Transfer Originating PI Signoff Denial Notification | Internal Transfer Originating PI Signoff Denial | Yes | Delete Notification |

| Edit | Type | When to Notify | Title | Send E-mail Notification | Action |
|------|--|--|---|--------------------------|---------------------|
| | Internal Transfer Originating PI Signoff Reminder Notification | Notify every 1 Days | Internal Transfer Originating PI Signoff Reminder | Yes | Delete Notification |
| | Internal Transfer Originating PI Signoff Exceeded Notification | Notify when signoff has not been completed within 5 Days | Internal Transfer Originating PI Signoff Exceeded | Yes | Delete Notification |

Internal Transfer Originating PI Signoff Notification

This notification is sent to the Principal Investigator of a study when an internal animal transfer has been initiated from another study.

Internal Transfer Originating PI Signoff Notification Setup

[Back](#)

Insert Merge Code Save Notification

| | |
|---------------------------|---|
| Type of Notification: | Internal Transfer Originating PI Signoff Notification |
| Title: | <input type="text" value="Internal Transfer Originating PI Signoff Notification"/> |
| Send E-Mail Notification: | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| E-mail Content: | <div style="border: 1px solid #ccc; padding: 5px;"> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> </div> <div style="padding: 5px;"> <p>Please review the internal animal transfer request.</p> </div> </div> |

Internal Transfer Originating PI Signoff Denial Notification

This notification is sent to the Principal Investigator of a study when an internal animal transfer request has been denied by the originating PI.

Internal Transfer Originating PI Signoff Notification Setup Back

Insert Merge Code Save Notification


| | |
|---------------------------|---|
| Type of Notification: | Internal Transfer Originating PI Signoff Denial Notification |
| Title: | Internal Transfer Originating PI Signoff Denial |
| Send E-Mail Notification: | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| E-mail Content: | <div style="border: 1px solid #ccc; padding: 5px;"> <p>Dear [%pi_name1%]:</p> <p>We regret to inform you that your internal animal transfer request has been denied by the originating study's Principal Investigator.</p> </div> |


When the originating PI denies the transfer request, a Submission Signoff Denied home screen task also generates.

Submission Signoff Denied 1

IRB Number ▾

1 task(s) found... 1 - 1

| Open | Principal Investigator | IRB Number | Study Alias | On Study Status | Ref Number | Submission Form Name | IRB Initial Approval | Expiration | Received | Denied by | Round Number |
|---|-------------------------|------------|-------------|-----------------|------------|--|----------------------|------------|------------|------------------|--------------|
|  | Jane Investigator, M.D. | | Mouse Study | Active | 5221 | Animal Resource Internal Transfer Form | | | 01/13/2017 | Bob Investigator | 1 |


Click the  icon in the open column to view the details of the signoff denial. From this screen, you can click the link to view the transfer from, open the study to make a correction and re-submit your request, or simply remove the item from your task list on your home screen.

Signoff Denied Back

Open Study to Make Correction Remove from Task List

| | |
|-------------------------------------|--|
| Study Title: | Mouse Study |
| Submission Reference Number: | 005221 |
| Signoff Details: | <p>Jane Investigator, M.D. Principal Investigator</p> <p>Comments:</p> <hr/> <p>Bob Investigator Internal Transfer Originating Principal Investigator</p> <p>Comments:</p> |

Click on the hyperlink to view the submission.

 [Animal Resource Internal Transfer Form](#)

Internal Transfer Originating PI Signoff Reminder Notification

This notification is generated to remind the originating PI that they have an outstanding internal transfer request. You can specify in the notification how frequently you would like this notification to generate by defining a number of days.

For example, if you enter “2” in the “Notify every ? Days” field, the originating PI will receive a notification every two days.

Internal Transfer Originating PI Signoff Notification Setup Back

Insert Merge Code Save Notification

| | |
|---------------------------|---|
| Type of Notification: | Internal Transfer Originating PI Signoff Reminder Notification |
| Title: | Internal Transfer Originating PI Signoff Reminder |
| Notify every ? Days | 1 in days. |
| Send E-Mail Notification: | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| E-mail Content: | <div style="border: 1px solid #ccc; padding: 5px;"> <p>Dear [%pi_name1%]:</p> <p>This notification is to remind you that you have an outstanding internal transfer request. Please review this request as soon as possible.]</p> </div> |

Internal Transfer Originating PI Signoff Exceeded Notification

This notification is generated and sent to the originating PI a specified number of days after the initial internal transfer signoff notification has been sent. You can indicate the number of days when setting up the notification. For example, a value of “5” in the “Notify when signoff has not been completed within ? Days” field means that this notification will generate five days after the original notification if the signoff has not yet been completed.

Internal Transfer Originating PI Signoff Notification Setup Back

Insert Merge Code Save Notification


| | |
|--|---|
| Type of Notification: | Internal Transfer Originating PI Signoff Exceeded Notification |
| Title: | Internal Transfer Originating PI Signoff Exceeded |
| Notify when signoff has not been completed within ? Days | 5 in days. |
| Send E-Mail Notification: | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| E-mail Content: | <div style="border: 1px solid #ccc; padding: 5px;"> <p>Dear [%pi_name1%]:</p> <p>This message is to inform you that it has been several days since you received a notification regarding an internal transfer request.</p> </div> |

Internal & External Transfer Coordinator Signoff Notification Setup

The notifications in this category are related to signoffs by the Transfer Coordinator on internal and external animal transfers.

Internal & External Transfer Coordinator Signoff Notification Setup

[Back](#)

| Edit | Type | Title | Send E-mail Notification | Action |
|---|--|---------------------------------------|--------------------------|---|
|  | Internal & External Transfer Coordinator Signoff Notification | Transfer Coordinator Signoff Required | Yes |  Delete Notification |
|  | Internal & External Transfer Coordinator Signoff Denial Notification | Transfer Coordinator Signoff Denied | Yes |  Delete Notification |

| Edit | Type | When to Notify | Title | Send E-mail Notification | Action |
|---|--|--|---------------------------------------|--------------------------|---|
|  | Internal & External Transfer Coordinator Signoff Reminder Notification | Notify every 1 Days | Transfer Coordinator Signoff Reminder | Yes |  Delete Notification |
|  | Internal & External Transfer Coordinator Signoff Exceeded Notification | Notify when signoff has not been completed within 5 Days | Transfer Coordinator Signoff Exceeded | Yes |  Delete Notification |


Internal & External Transfer Coordinator Signoff Notification

This notification is sent to the designated Transfer Coordinator when they have been assigned to sign off on an internal or external animal transfer.

Internal & External Transfer Coordinator Signoff Notification Setup

[Back](#)

 Insert Merge Code  Save Notification

| | |
|----------------------------------|--|
| Type of Notification: | Internal & External Transfer Coordinator Signoff Notification |
| Title: | <input type="text" value="Transfer Coordinator Signoff Required"/> |
| Send E-Mail Notification: | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| E-mail Content: | <div style="border: 1px solid #ccc; padding: 5px;"> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;">  </div> <div style="padding: 5px;"> <p>This notification is to inform you that your signoff is required on an animal transfer.</p> </div> </div> |

Internal & External Transfer Coordinator Signoff Denial Notification

This notification is sent to the PI of a study when an internal or external animal transfer has been denied by the Transfer Coordinator.

Internal & External Transfer Coordinator Signoff Notification Setup ◀ Back

| | |
|----------------------------------|--|
| Type of Notification: | Internal & External Transfer Coordinator Signoff Denial Notification |
| Title: | <input type="text" value="Transfer Coordinator Signoff Denied"/> |
| Send E-Mail Notification: | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| E-mail Content: | <div style="border: 1px solid #ccc; padding: 5px;"> <p>Dear [%pi_name1%]:</p> <p>We regret to inform you that your animal transfer request has been denied by the Transfer Coordinator.</p> </div> |

When a transfer is denied, the PI of the study requesting the animals will also receive a Submission Signoff Denied home screen task, as described earlier in the manual.

Internal & External Transfer Coordinator Signoff Reminder Notification

This notification is generated to remind the Transfer Coordinator that they have an outstanding internal or external transfer request. You can specify in the notification how frequently you would like this notification to generate by defining a number of days. For example, if you enter “2” in the “Notify every ? Days” field, the Transfer Coordinator will receive a notification every two days.

Internal & External Transfer Coordinator Signoff Notification Setup ◀ Back

| | |
|----------------------------------|---|
| Type of Notification: | Internal & External Transfer Coordinator Signoff Reminder Notification |
| Title: | <input type="text" value="Transfer Coordinator Signoff Reminder"/> |
| Notify every ? Days | <input type="text" value="1"/> in days. |
| Send E-Mail Notification: | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| E-mail Content: | <div style="border: 1px solid #ccc; padding: 5px;"> <p>This notification is to inform you that you have an outstanding animal transfer request to sign off on. Please review this request as soon as possible.</p> </div> |

Internal & External Transfer Coordinator Signoff Exceeded Notification

This notification is generated and sent to the Transfer Coordinator a specified number of days after the initial internal transfer signoff notification has been sent. You can indicate the number of days when setting up the notification. For example, a value of “5” in the “Notify when signoff has not been completed within ? Days” field means that this notification will generate five days after the original notification if the signoff has not yet been completed.

Internal & External Transfer Coordinator Signoff Notification Setup ◀ Back

| | |
|---|---|
| Type of Notification: | Internal & External Transfer Coordinator Signoff Exceeded Notification |
| Title: | <input type="text" value="Transfer Coordinator Signoff Exceeded"/> |
| Notify when signoff has not been completed within ? Days | <input type="text" value="5"/> in days. |
| Send E-Mail Notification: | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| E-mail Content: | <div style="border: 1px solid #ccc; padding: 5px;"> <p>ABC [Icons] B I U abc x₂ x² [Icons] [Icons]</p> <p>Normal (...) Font Size [Icons]</p> <p>This message is to remind you that it has been several days since you received an animal transfer request.</p> </div> |

Internal & External Transfer Veterinarian Signoff Notification Setup

The notifications in this category are related to signoffs by the veterinarian on internal and external animal transfers.

Internal & External Transfer Veterinarian Signoff Notification Setup ◀ Back

| Edit | Type | Title | Send E-mail Notification | Action |
|------|---|-------------------------------|--------------------------|--|
| | Internal & External Transfer Veterinarian Signoff Notification | Veterinarian Signoff Required | Yes | <input type="button" value="Delete Notification"/> |
| | Internal & External Transfer Veterinarian Signoff Denial Notification | Veterinarian Signoff Denied | Yes | <input type="button" value="Delete Notification"/> |

| Edit | Type | When to Notify | Title | Send E-mail Notification | Action |
|------|---|--|-------------------------------|--------------------------|--|
| | Internal & External Transfer Veterinarian Signoff Reminder Notification | Notify every 1 Days | Veterinarian Signoff Reminder | Yes | <input type="button" value="Delete Notification"/> |
| | Internal & External Transfer Veterinarian Signoff Exceeded Notification | Notify when signoff has not been completed within 5 Days | Veterinarian Signoff Exceeded | Yes | <input type="button" value="Delete Notification"/> |

Internal & External Transfer Veterinarian Signoff Notification

This notification is sent to the designated veterinarian when they have been assigned to sign off on an internal or external animal transfer.

Internal & External Transfer Veterinarian Signoff Notification Setup ◀ Back

Insert Merge Code Save Notification

| | |
|----------------------------------|---|
| Type of Notification: | Internal & External Transfer Veterinarian Signoff Reminder Notification |
| Title: | Veterinarian Signoff Reminder |
| Notify every ? Days | 1 in days. |
| Send E-Mail Notification: | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| E-mail Content: | <div style="border: 1px solid #ccc; padding: 5px;"> <p>This notification is to inform you that you have an outstanding animal transfer request to sign off on. Please review this request as soon as possible.</p> </div> |

Internal & External Transfer Veterinarian Signoff Exceeded Notification

This notification is generated and sent to the veterinarian a specified number of days after the initial internal transfer signoff notification has been sent. You can indicate the number of days when setting up the notification. For example, a value of “5” in the “Notify when signoff has not been completed within ? Days” field means that this notification will generate five days after the original notification if the signoff has not yet been completed.

Internal & External Transfer Veterinarian Signoff Notification Setup ◀ Back

Insert Merge Code Save Notification

| | |
|---|--|
| Type of Notification: | Internal & External Transfer Veterinarian Signoff Exceeded Notification |
| Title: | Veterinarian Signoff Exceeded |
| Notify when signoff has not been completed within ? Days | 5 in days. |
| Send E-Mail Notification: | <input checked="" type="radio"/> Yes <input type="radio"/> No |
| E-mail Content: | <div style="border: 1px solid #ccc; padding: 5px;"> <p>This message is to remind you that it has been several days since you received an animal transfer request.</p> </div> |

System Administration

Under System Administration > System Configuration > Animal Resource Center, there are four properties that allow you to determine how certain aspects of the ARC order and transfer forms are configured:

system.use_arc_foundation – This property controls whether the Foundation field appears in the Funding section of an animal order or transfer form.

system.use_arc_requisition – This property controls whether the Requisition field appears in the Funding section of an animal order or transfer form.

system.use_arc_study_accounts – When this property is set to “Yes,” instead of a field where you can type in the Order Charge Account, a dropdown menu will appear in this field containing the cost centers that have been set up for the study. Cost centers are created under Study Management > Finance Set-up > Study Accounts.

system.use_arc_unique_anatomical_features – This property controls whether the Unique Anatomical Features/Phenotype field appears on an animal order or transfer form.