



Animal Resource Center

Review Board Administration Notifications

Software Version: 11.02.01

Manual Version: P2

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Introduction

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

This manual is focused on Animal Resource Center Review Board Administration Notifications.

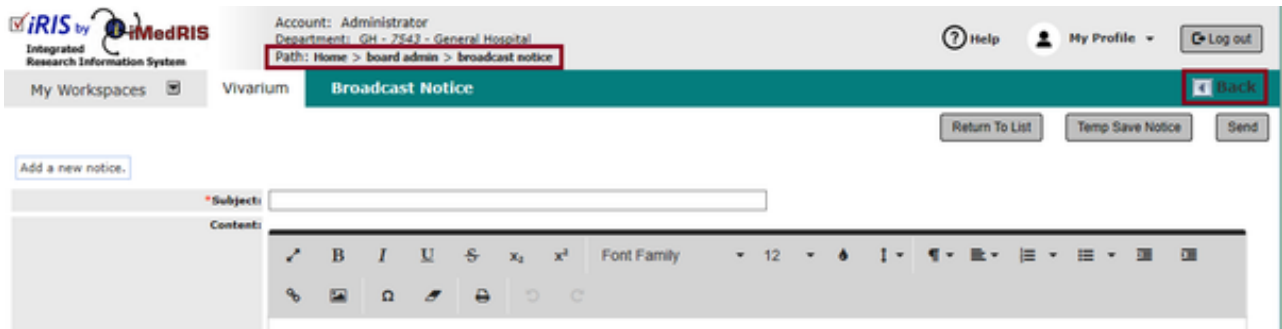
Navigation in iRIS™

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.

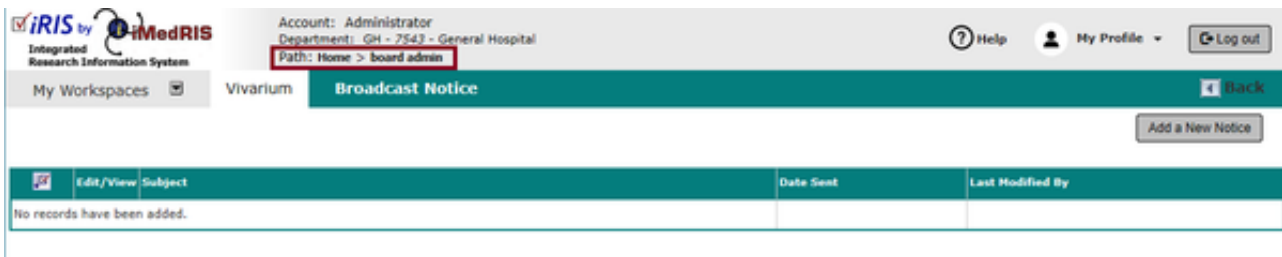
Path Directory Tree

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

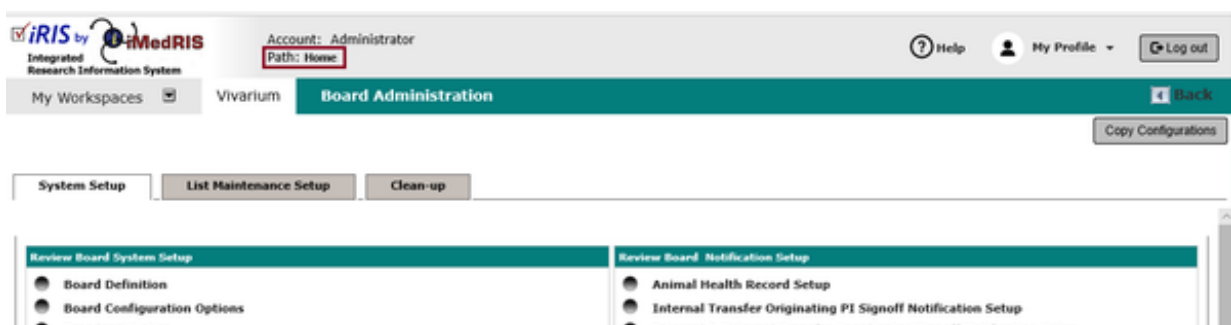
In the example shown the user is viewing the **Broadcast Notice Add a new notice** page. This page is nested three levels beneath the main workspace page, as indicated by the three links available in the **Path** directory tree: **Home**, **board admin** and **broadcast notice**.



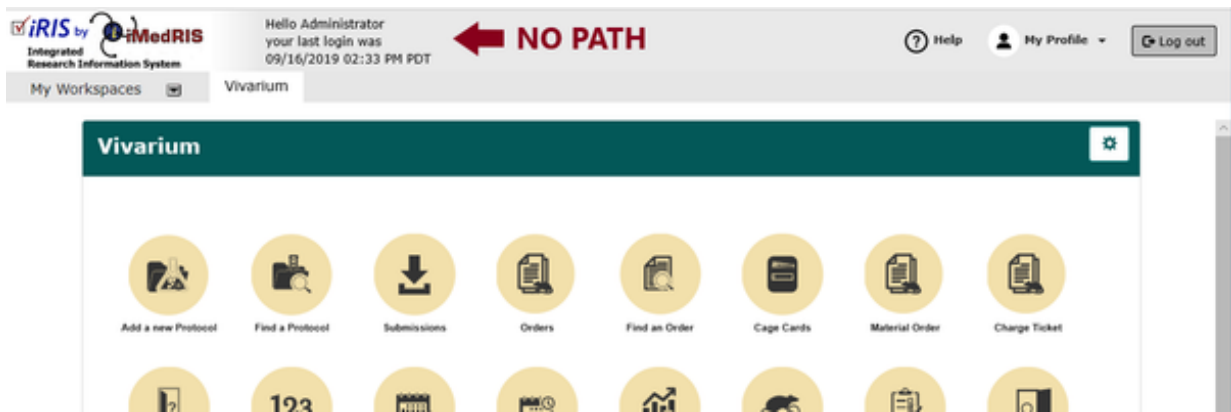
Click on **broadcast notice** in the **Path** to navigate up one level in the directory tree, to the main **Broadcast Notice** page. There are now two levels in the **Path** directory tree: **board admin** and **Home**.



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**.

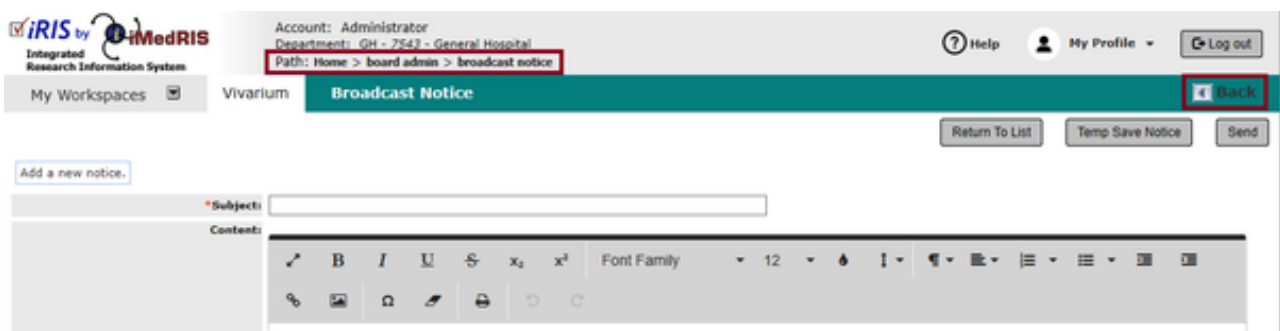


Click on **Home** in the **Path** to navigate up one level in the directory tree, to the main Workspace page. No Path item is displayed here because the user is now at the top-most level of the directory tree.

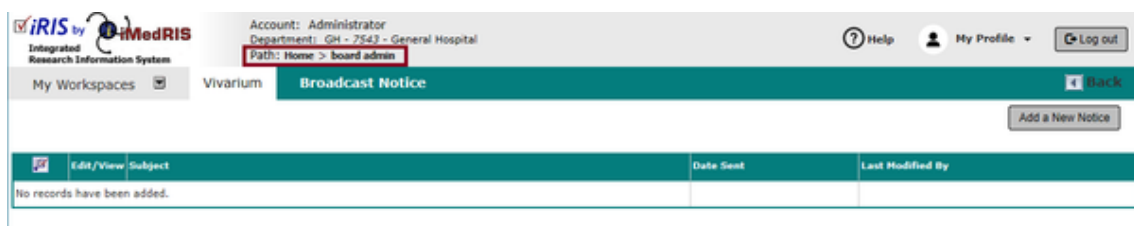


Back Button

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**.



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:

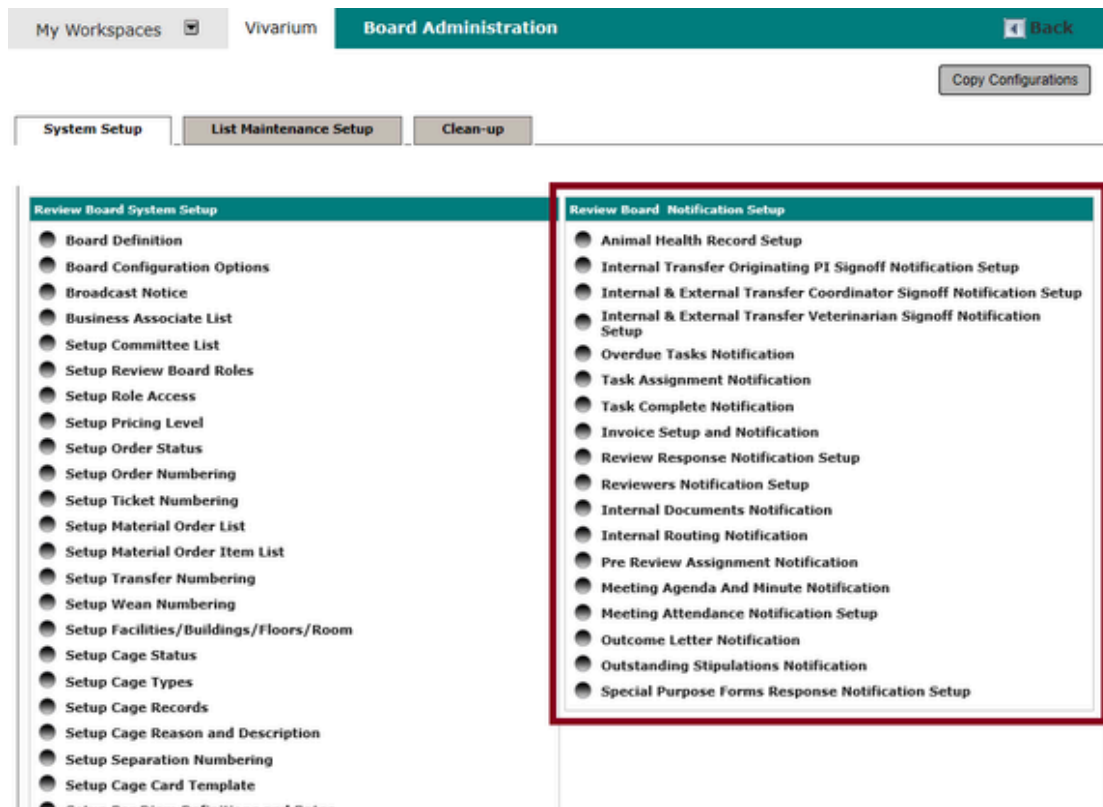


Clicking the **Back** button on the **Broadcast Notice** page returns the user to the Board Administration page, as indicated by the last link in the **Path** directory tree shown in the screenshot above.

*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.*

Review Board Notification Setup

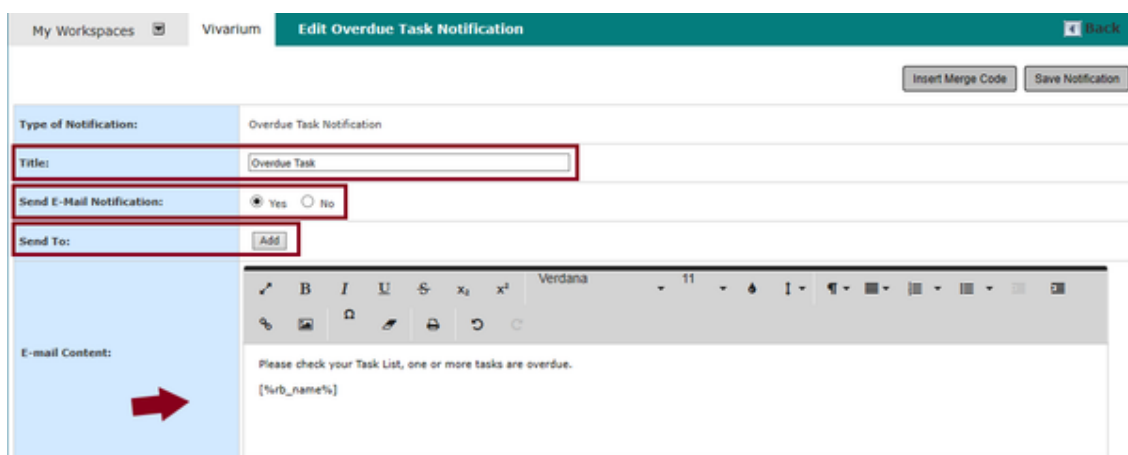
The **Review Board Notification Setup** panel, accessed via Animal Resource Center > Review Board Administration, provides links for configuration of various standardized notification types to be sent to applicable study personnel and board members.



Notifications configured here are automatically sent to applicable personnel when study tasks (e.g., review, signoff, set meeting availability, etc.) are assigned, completed, or overdue.

General Notification Setup Process

The general procedure for creating and editing notifications in iRIS™ is the same, regardless of type. A text editor panel is opened for creation and formatting of the notification boilerplate text, and system Merge Codes are optionally inserted to pull system data field values into the notification.



As shown in the example screenshot above:

The **Title** field is used as the subject line in the notification e-mail.

Some notifications include a **Send E-Mail Notification** Yes/No selection field. If “Yes” is selected the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Most notifications are automatically routed to responsible personnel based on their assigned role in the iRIS™ system, but some include an **Add** button for selection of specific iRIS™ users to receive the notification.

My Workspaces Vivarium **Edit Outstanding Stipulations Notification** Back

Insert Merge Code Save Notification

Type of Notification: Outstanding Stipulations Notification

Title:

Notification if within: 30 in days.

Send E-Mail Notification: Yes No

Send To: Principal Investigator Study Contact

E-mail Content:

As shown in the screenshot above, some reminder notification types include a **Notification if Within** field, to specify how many days ahead of the task due date the notification is to be sent.

My Workspaces Vivarium **Setup Internal Transfer Originating PI Signoff Notification** Back

Insert Merge Code Save Notification

Type of Notification: Internal Transfer Originating PI Signoff Reminder Notification

Title: PI Signoff Required

Notify every ? Days: 1 in days.

Send E-Mail Notification: Yes No

E-mail Content: PI signoff is required. Please check your Task List and complete any pending signoff tasks. [%rb_name%]

As shown in the screenshot above, some reminder notifications include a **Notify every ? Days** field to specify how frequently the reminder is to be re-sent until the assigned task or signoff is complete.

My Workspaces ▾ Vivarium **Setup Internal Transfer Originating PI Signoff Notification** [Back](#)

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

Type of Notification:	Internal Transfer Originating PI Signoff Exceeded Notification
Title:	Signoff Deadline Exceeded
Notify when signoff has not been completed within ? Days	2 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>B <i>I</i> <u>U</u> S x_2 x^2 Verdana 11</p> <p>You have exceeded one or more signoff deadlines. Please check your Task List and complete any required signoff tasks.</p> <p>{%rb_name%}</p> </div>

As shown in the screenshot above, some signoff exceeded notifications include a **Notify when signoff has not been completed within ? Days** field. When a requested signoff is overdue, this field specifies a reminder notification is to be sent ? **Days** after the due date.

Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor.

E-mail Content:	<div style="border: 1px solid #ccc; padding: 5px;"> <p>B <i>I</i> <u>U</u> S x_2 x^2 Verdana 11</p> <p>You have exceeded one or more signoff deadlines. Please check your Task List and complete any required signoff tasks.</p> <p>{%rb_name%}</p> </div>
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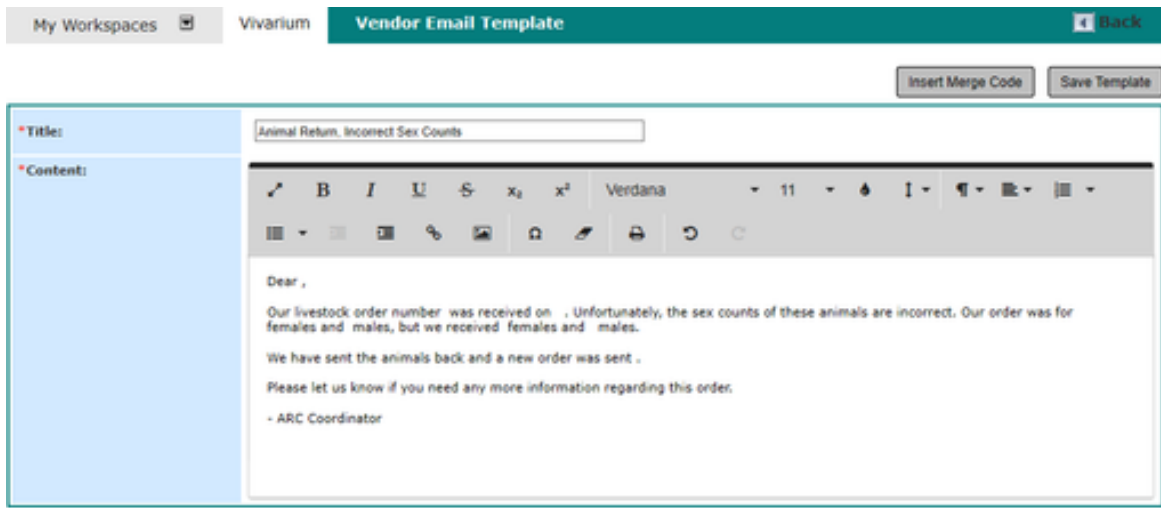
See the *Using Merge Codes in Notifications* section of this manual, immediately following, for more information.

Using Merge Codes in Notifications

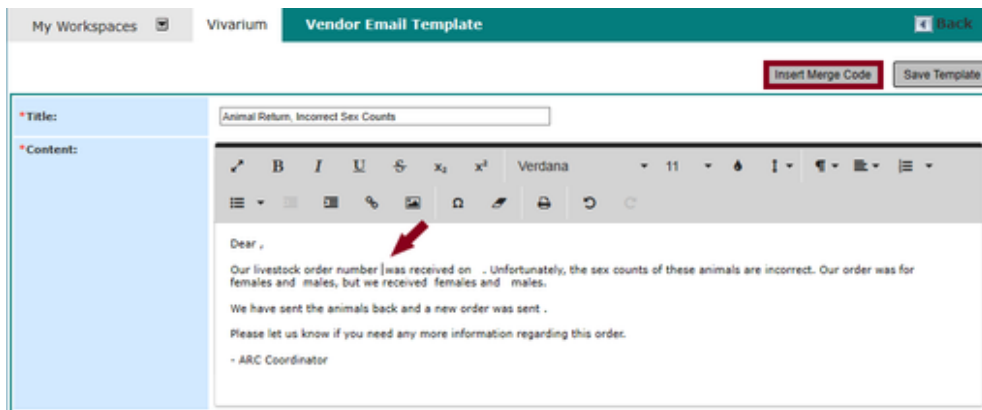
Merge Codes are used to pull data from iRIS™ records into documents, templates, forms and system webpages. Merge Codes are selected from a picklist, there is no need to write or edit any programmatic code to use Merge Codes.

iRIS™ pages used for creation of email, document and form templates contain a text editor with standard text editing and formatting tools. Desired boilerplate text is entered, leaving spaces open for insertion of Merge Codes where applicable.

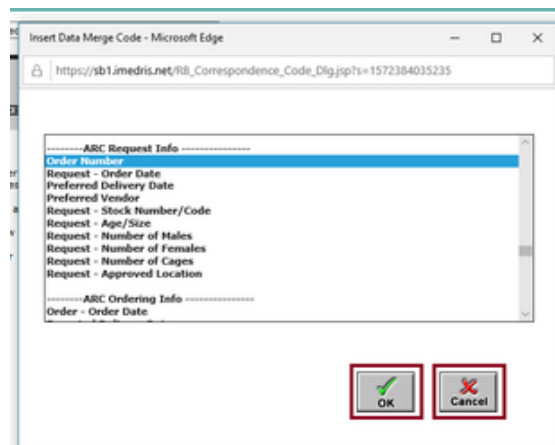
In the screenshot below a **Vendor Email Template** has been created to address the problem of incorrect sex counts in a livestock order. Empty spaces are left open where Merge Codes are to be inserted.



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

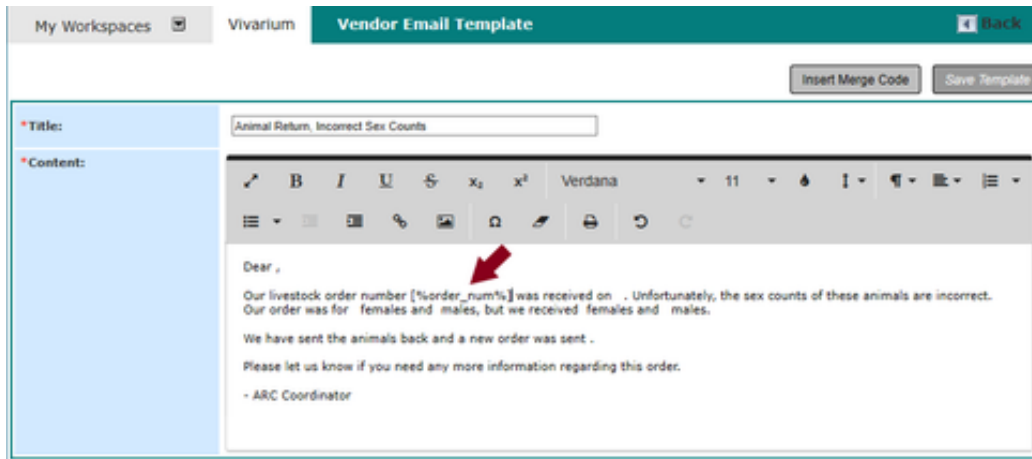


The **Insert Data Merge Code** popup window displays. Scroll down to the sections of the list labeled for Animal Resource Center and select the desired Merge Code. In this example, the Merge Code for “Order Number” is selected.

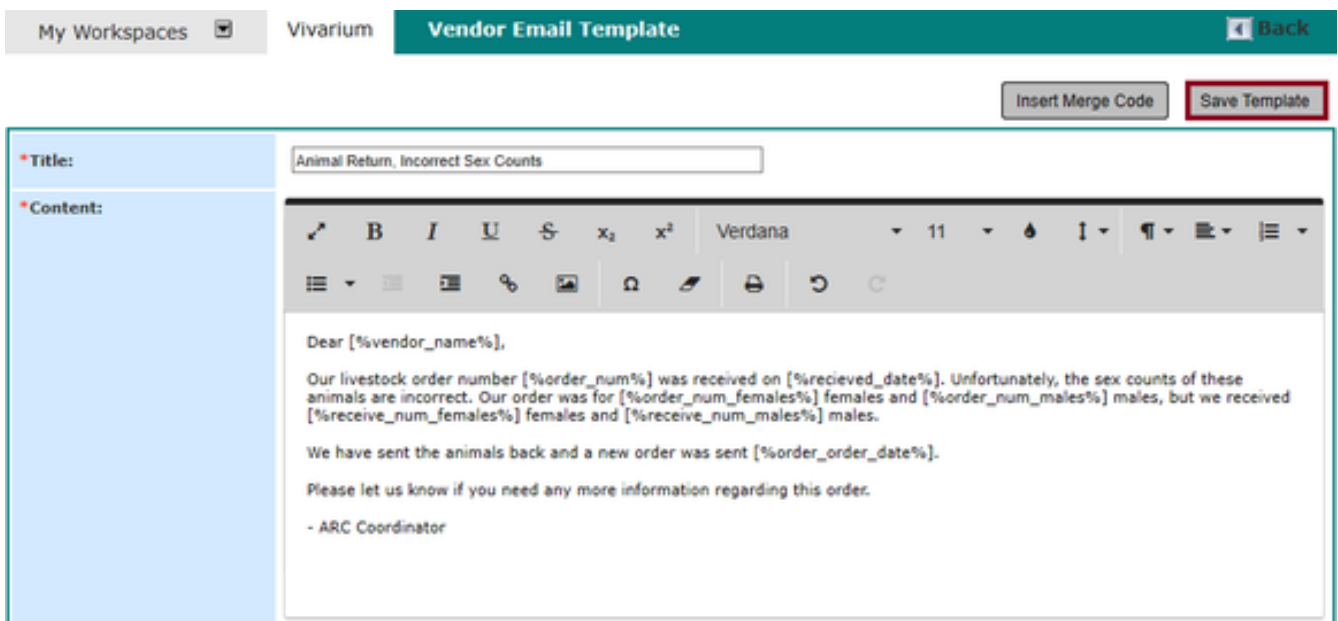


Click the **Cancel** button to close the popup without inserting the Merge Code.

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



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.

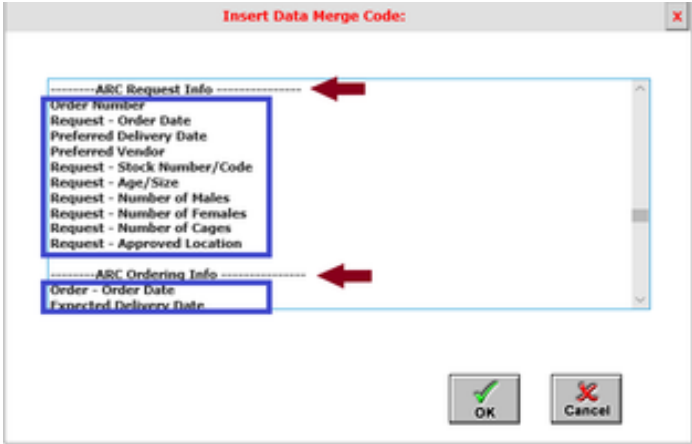


Merge Code List

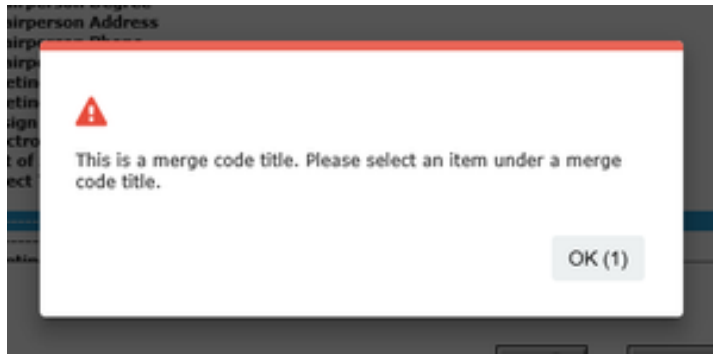
Depending on the user’s data access rights and the institution’s Review Board Administration settings, the Merge Code list can include system data from the following categories:

Review Board	Study Financial Information
Meetings	Submission Information
Multi-Site	Animal Resource Center Request Information
Study Personnel	Animal Resource Center Ordering Information
Study Contacts	Animal Resource Center Receiving Information
Form Creator	Animal Resource Center 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.



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



Merge Codes Applicable to Animal Resource Center

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

---Animal Resource Center Request Info ---	---Animal Resource Center Ordering Info ---	---Animal Resource Center Receiving Info ---	---Animal Resource Center 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		

Merge Codes Applicable to Meetings

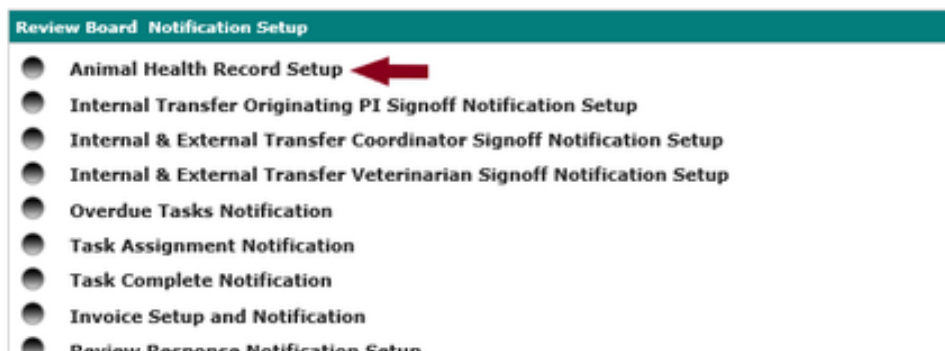
Categories and Merge Codes from the list that are most applicable to meetings are summarized in the table below.

---Review Board Info ---	---Meeting Attendance Codes ---	---Submission Info ---
Review Board Name	Meeting Call to Order	Submission Approval Date
Review Board Committee Name	Meeting New Business	Submission Type
Chairperson Name (Last Name, First Name)	Meeting Old Business	Submission List of all reviewers
Chairperson Name (First Name, Last Name)	Meeting Miscellaneous	Submission Primary Reviewer
Chairperson First Name	Meeting Closing Comments	Submission Secondary Reviewer
Chairperson Middle Name	Meeting Actual Start Time	Submission all additional reviewers over secondary
Chairperson Last Name	Meeting Actual End Time	Submission AD Hoc Reviewers
Chairperson Degree	Meeting Planned Start Time	Item Number on Agenda
Chairperson Address	Meeting Planned End Time	All Project Departments
Chairperson Phone	Meeting Chair (Last, First)	All Project Institutions
Chairperson EMAIL	Meeting Chair (First, Last)	Project Title
Electronic Signature	Total Voting Members	Project Short Title
Meeting Date	Quorum	Project Status
Meeting Location	Voting Members Present	Study Title
	Non-Voting Members Present	Study Alias

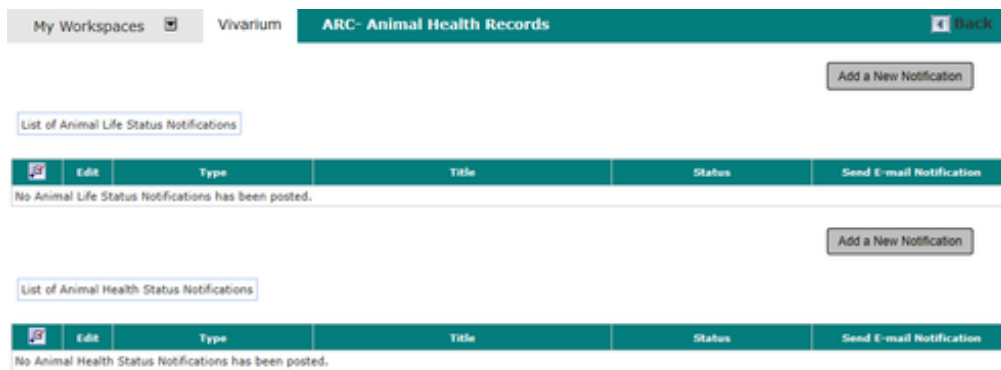
	Alternate Members Present	Study Status
	Members Absent	Sponsor/Funding Source
	Member Ex-officio Present	Proposal Number
	Administrative Staff Present	Proposal Title
	Guests Present	Proposal Short Title
	Meeting Motions	Project Award Number
		Project Previous Award Number
		Project Open Ended
		Is Archived
		Archived Location

Animal Health Record Notifications

Animal health and life status notifications can be automatically sent to applicable study personnel any time a change in subject animal health or life status is saved to the system. These notifications are configured on the **Animal Resource Center – Animal Health Records** page. To access the page, navigate to Animal Resource Center > Review Board Administration > **Animal Health Record Setup** link.



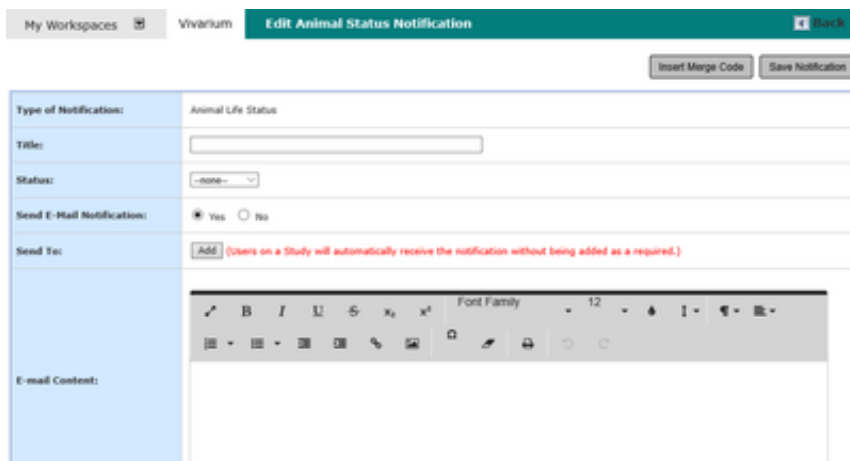
The **Animal Resource Center – Animal Health Records** page opens. The page looks as shown below when no notifications are configured.



There are two (2) types of animal health record notifications, one for life status changes and one for health status changes.

Configured animal life status notifications (e.g., Deceased, Euthanized, etc.) are shown in the **List of Animal Life Status Notifications** list at the top of the page. Configured animal health status notifications (e.g., Healthy, Immunosuppressed, etc.) are shown in the **List of Animal Health Status Notifications** list at the bottom of the page.

Both types employ the same general add/edit form, shown below.



The **Type of Notification** is pre-populated as either “Animal Life Status” or “Animal Health Status”.

The **Title** field is used as the subject line in the notification e-mail.

The **Status** field provides a dropdown list of life statuses for a life status notification, and a dropdown list of health statuses for a health status notification. *Note that these lists are configured under Animal Resource Center > Review Board Administration > System Setup tab, via the Setup Life Status and Setup Health Status links.*

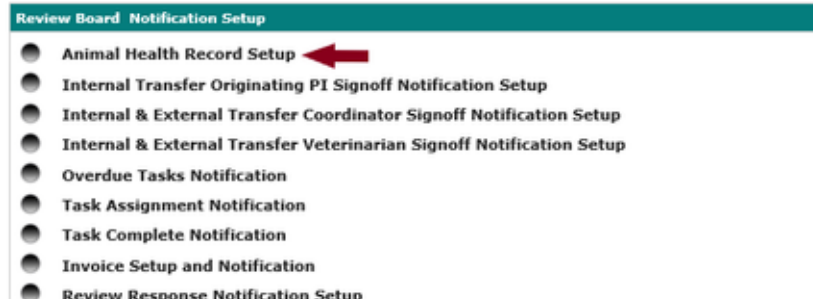
If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

As the note on the **Send To** line indicates, study personnel are automatically added to the routing list for this type of notification. An **Add** button is provided for selection of specific, additional iRIS™ users to receive the notification.

Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Add Animal Status Notification

Navigate to Animal Resource Center > Review Board Administration > **Animal Health Record Setup** link.



The **Animal Resource Center – Animal Health Records** page opens. Click the applicable **Add a New Notification** button.



The **Edit Animal Status Notification** page opens for creation of the notification.

My Workspaces Vivarium Edit Animal Status Notification Back

Insert Merge Code Save Notification

Type of Notification: Animal Life Status

Title: Change in Subject Animal Life Status

Status: **None** (dropdown menu open with options: None, Alive, Called, Deceased, Euthanized, Shipped)

Send E-Mail Notifications: Yes No

Send To: Add (Users on a Study will automatically receive the notification without being added as a required.)

E-mail Content: [Rich text editor toolbar]

The example shown above is a life status notification, so its **Type of Notification** field specifies “Animal Life Status”. In a health status notification, this field would read “Animal Health Status”.

Enter a **Title** for the notification. This text will appear as the e-mail subject line of the notification.

Select a **Status** from the dropdown list. The example shown above is a life status notification, so its **Status** field contains the life status dropdown list (configured via Animal Resource Center > Review Board Administration > Setup Life Status link). In a health status notification, this field would contain the health status dropdown list (configured via Animal Resource Center > Review Board Administration > Setup Health Status link).

My Workspaces Vivarium Edit Animal Status Notification Back

Insert Merge Code Save Notification

Type of Notification: Animal Life Status

Title: Change in Subject Animal Life Status

Status: Euthanized

Send E-Mail Notification: Yes No

Send To: Add (Users on a Study will automatically receive the notification without being added as a required.)

E-mail Content: [Rich text editor toolbar]

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

As the note on the **Send To** line indicates, study personnel are automatically added to the routing list for this type of notification. Click the **Add** button to select specific, additional iRIS™ users to receive the notification. The **Search User Directory** page opens for user lookup and selection.

My Workspaces ▼ Vivarium **Search User Directory** ⌂ Back

Directory Browse/Find: Last Name: (You may enter a partial name to search)
 First Name:
 by Department: Find

(search results display here)

As shown in the screenshot above, the user directory can be searched by full or partial **Last Name** or **First Name**, by **Department**, or by any combination of the three. Enter desired search criteria in the top section of the form and click the **Find** button. Search results display in the lower part of the page.

My Workspaces ▼ Vivarium **Search User Directory** ⌂ Back Save Selected User(s)

Directory Browse/Find: Last Name: (You may enter a partial name to search)
 First Name:
 by Department: Find

Check for Multiple	Select User	Training	User Name	Department	Email
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Harper, Jill M, M.D., PhD		jHarp@msc.edu

↑ ↑

Click the checkmark icon in the **Select User** column to add a single user to the notification distribution list.

The results list may include multiple names of iRIS™ users to be added to the distribution list. In that case select the checkbox(es) at far left for all applicable users and click the **Save Selected User(s)** button. The selected user(s) is (are) added on the **Edit Animal Status Notification** page.

My Workspaces ▼ Vivarium **Edit Animal Status Notification** ⌂ Back

Insert Merge Code Save Notification

Type of Notification: Animal Life Status
 Title:
 Status:
 Send E-Mail Notification: Yes No
 Send To: Add Delete (Users on a Study will automatically receive the notification without being added as a required.)
 Harper, Jill M, M.D., PhD

E-mail Content:

Rich text editor toolbar: B, I, U, x_2 , x^3 , Font Family, 12,

If a user is added in error, select the checkbox to the left of that user's name and click the **Delete** button to remove the user from distribution.

As shown below, desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. See the *Using Merge Codes in Notifications* section of this manual for more information.

My Workspaces Vivarium **Edit Animal Status Notification** Back

Insert Merge Code Save Notification

Type of Notification: Animal Life Status

Title: Change in Subject Animal Life Status

Status: Euthanized

Send E-Mail Notification: Yes No

Send To: Add Delete (Users on a Study will automatically receive the notification without being added as a required.)
 Harper, Jill M, H.D., PhD

E-mail Content: Study animals are euthanized and ready for post-mortem examination.
[%b_name%]

Click the **Save Notification** button. The notification is added on the **Animal Resource Center – Animal Health Records** page.

My Workspaces Vivarium **ARC- Animal Health Records** Back

Add a New Notification Delete Notification(s)

List of Animal Life Status Notifications

Edit	Type	Title	Status	Send E-mail Notification
<input type="checkbox"/>	Animal Life Status	Change in Subject Animal Life Status	Euthanized	Yes

Add a New Notification

List of Animal Health Status Notifications

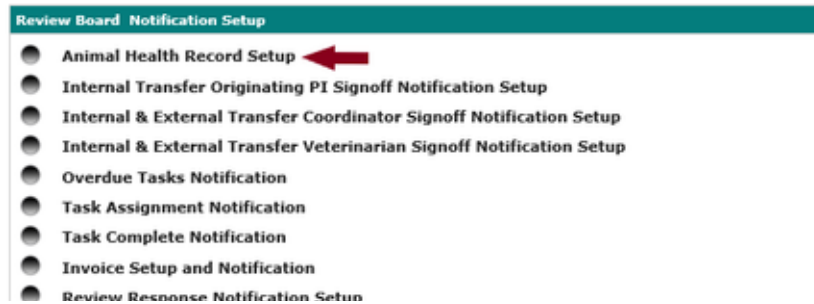
Edit	Type	Title	Status	Send E-mail Notification
No Animal Health Status Notifications has been posted.				

Because the example is a life status notification the record is added to the **List of Animal Life Status Notifications**. Health status notifications are added to the **List of Animal Health Status** notifications.

Notice that a **Delete Notification(s)** button now appears above the applicable notification list. This button only appears when the list has at least one entry. Notice also that the **Add a New Notification** button remains, indicating that multiple animal life status notifications can be created. The same is true for animal health status notifications.

Edit Animal Status Notification

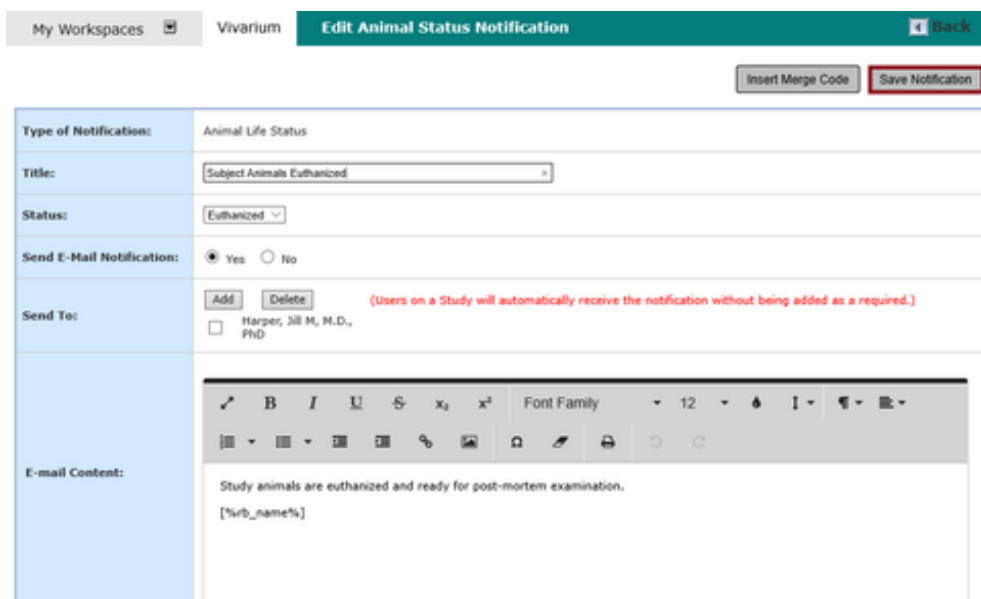
Navigate to Animal Resource Center > Review Board Administration > **Animal Health Record Setup** link.



The ARC – Animal Health Records page opens. Click the icon in the **Edit** column for the applicable notification.



The record is opened for editing in the **Edit Animal Status Notification** page.



Make desired changes to the notification.

The example shown above is a life status notification, so its **Type of Notification** field specifies “Animal Life Status”. In a health status notification, this field would read “Animal Health Status”.

Title text will appear as the e-mail subject line of the notification.

The example shown above is a life status notification, so its **Status** field contains the life status dropdown list (configured via Animal Resource Center > Review Board Administration > Setup Life Status link). In a health status notification, this field would contain the health status dropdown list (configured via Animal Resource Center > Review Board Administration > Setup Health Status link).

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

As the note on the **Send To** line indicates, study personnel are automatically added to the routing list for this type of notification. Click the **Add** button to select specific, additional iRIS™ users to receive the notification. The **Search User Directory** page opens for user lookup and selection.

As shown in the screenshot above, the user directory can be searched by full or partial **Last Name** or **First Name**, by **Department**, or by any combination of the three. Enter desired search criteria in the top section of the form and click the **Find** button. Search results display in the lower part of the page.

Check for Multiple	Select User	Training	User Name	Department	Email
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Harper, Jill N, M.D., PhD		jharp@msc.edu

Click the checkmark icon in the **Select User** column to add a single user to the notification distribution list.

The results list may include multiple names of iRIS™ users to be added to the distribution list. In that case select the checkbox(es) at far left for all applicable users and click the **Save Selected User(s)** button. The selected user(s) is (are) added on the **Edit Animal Status Notification** page.

My Workspaces ▾ Vivarium **Edit Animal Status Notification** [Back](#)

Insert Merge Code Save Notification

Type of Notification:	Animal Life Status
Title:	Change in Subject Animal Life Status
Status:	Euthanized ▾
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Send To:	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <div style="display: inline-block; vertical-align: top; margin-left: 5px;"> <input type="button" value="Add"/> <input type="button" value="Delete"/> </div> <div style="display: inline-block; vertical-align: top; margin-left: 5px;"> <p>(Users on a Study will automatically receive the notification without being added as a required.)</p> <p>Harper, Jill M, M.D., PhD</p> </div>
E-mail Content:	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Font Family 12</p> <p>Study animals are euthanized and ready for post-mortem examination.</p> <p>[%b_name%]</p> </div>

If a user is added in error, select the checkbox to the left of that user's name and click the **Delete** button to remove the user from distribution.

Revise boilerplate text and Merge Codes as desired in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

My Workspaces ▾ Vivarium **Edit Animal Status Notification** [Back](#)

Insert Merge Code **Save Notification**

Type of Notification:	Animal Life Status
Title:	Change in Subject Animal Life Status
Status:	Euthanized ▾
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Send To:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <div style="display: inline-block; vertical-align: top; margin-left: 5px;"> <input type="button" value="Add"/> <input type="button" value="Delete"/> </div> <div style="display: inline-block; vertical-align: top; margin-left: 5px;"> <p>(Users on a Study will automatically receive the notification without being added as a required.)</p> <p>Harper, Jill M, M.D., PhD</p> </div>
E-mail Content:	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Font Family 12</p> <p>Study animals are euthanized and ready for post-mortem examination.</p> <p>[%b_name%]</p> </div>

Click the **Save Notification** button. The notification is revised on the **Animal Resource Center – Animal Health Records** page.

My Workspaces ▼ Vivarium **ARC- Animal Health Records** ⌕ [Back](#)

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

List of Animal Life Status Notifications

<input type="checkbox"/>	Edit	Type	Title	Status	Send E-mail Notification
<input type="checkbox"/>	Edit	Animal Life Status	Subject Animals Euthanized	Euthanized	Yes

[Add a New Notification](#)


List of Animal Health Status Notifications

<input type="checkbox"/>	Edit	Type	Title	Status	Send E-mail Notification
No Animal Health Status Notifications has been posted.					

Delete Animal Status Notification

Navigate to Animal Resource Center > Review Board Administration > **Animal Health Record Setup** link.

Review Board Notification Setup

- Animal Health Record Setup** 
- Internal Transfer Originating PI Signoff Notification Setup
- Internal & External Transfer Coordinator Signoff Notification Setup
- Internal & External Transfer Veterinarian Signoff Notification Setup
- Overdue Tasks Notification
- Task Assignment Notification
- Task Complete Notification
- Invoice Setup and Notification
- Review Response Notification Setup

The **ARC – Animal Health Records** page opens.

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

Select the checkbox in the far-left column for the notification(s) to be deleted and click the **Delete Notification(s)** button.

My Workspaces ▼ Vivarium **ARC- Animal Health Records** ⌕ [Back](#)

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

List of Animal Life Status Notifications

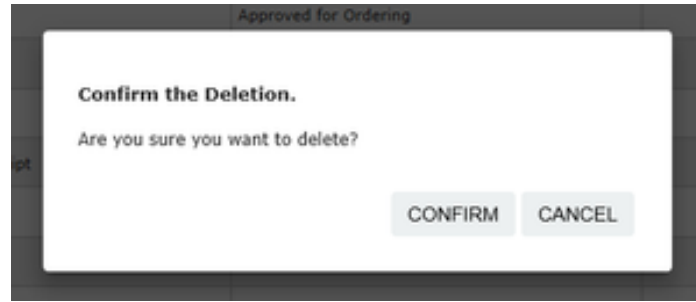
<input type="checkbox"/>	Edit	Type	Title	Status	Send E-mail Notification
<input type="checkbox"/>	Edit	Animal Life Status	Subject Animals Euthanized	Euthanized	Yes

[Add a New Notification](#)

List of Animal Health Status Notifications

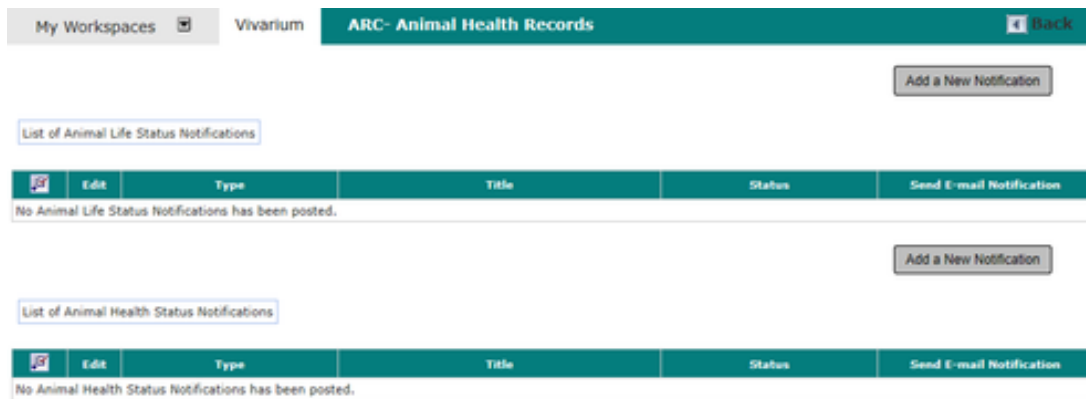
<input type="checkbox"/>	Edit	Type	Title	Status	Send E-mail Notification
No Animal Health Status Notifications has been posted.					

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 – Animal Health Records** page.



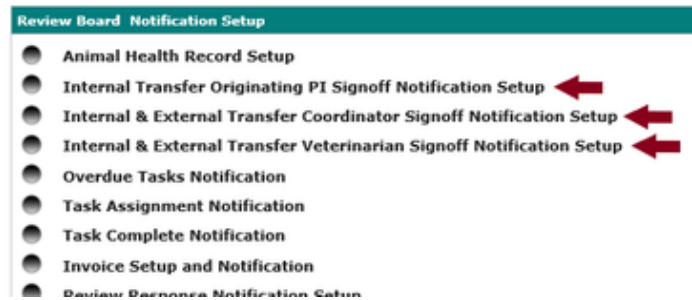
Notice that the **Delete Notification(s)** button no longer appears when the applicable notification list is empty.

Transfer Signoff Notifications

Transfer signoff notifications can be configured in the iRIS™ system via a transfer signoff notification setup page. When configured, these notifications are automatically sent to applicable study personnel when a transfer signoff task is initially assigned or when an assigned transfer signoff task is incomplete. A separate setup page is provided for each of the following three study personnel roles:

- Internal Transfer Originating PI
- Internal & External Transfer Coordinator
- Internal & External Transfer Veterinarian

To access the respective setup pages, navigate to Animal Resource Center > Review Board Administration > [applicable setup link].



The contents of the respective setup pages are the same for all three study personnel roles, and each contains options to configure four notification types.

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	Not Defined	Not Defined	Add 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 Required	Yes	Delete Notification
	Internal & External Transfer Coordinator Signoff Exceeded Notification	Not Defined	Not Defined	Not Defined	Add Notification

A **Transfer Signoff Notification** is sent to applicable study personnel when their signoff is required for an animal transfer order.

A **Transfer Signoff Denial Notification** is sent to applicable study personnel when their signoff for an animal transfer order is denied by the applicable Board.

A **Transfer Signoff Reminder Notification** is sent to applicable study personnel when *the signoff due date has not yet passed* AND signoff has not yet been received.

A **Transfer Signoff Exceeded Notification** is sent to applicable study personnel when *the signoff due date has passed* AND signoff has not yet been received.

Edit	Type	Title	Send E-mail Notification	Action
	Internal & External Transfer Coordinator Signoff Notification	Transfer Coordinator Signoff Required	Yes	<input type="button" value="Delete Notification"/>
	Internal & External Transfer Coordinator Signoff Denial Notification	Not Defined	Not Defined	<input type="button" value="Add 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 Required	Yes	<input type="button" value="Delete Notification"/>
	Internal & External Transfer Coordinator Signoff Exceeded Notification	Not Defined	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

As shown in the screenshot above:

- only one version of each notification type can be configured, no add button is provided for notification types that are already configured
- until a notification type is configured its **When to Notify** (where applicable), **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and an add button is provided for the notification (red boxes)
- after a notification type is configured its **When to Notify**, **Title** and **Send E-Mail Notification** fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

As shown in the screenshot below, the configuration panel for each of the two (2) types of transfer signoff notification contains the same fields.

My Workspaces ▾ Vivarium **Setup Internal & External Transfer Coordinator Signoff Notification** 1 Back

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;"> <p style="font-size: 0.9em; margin: 0;"> B I U x₂ x² Verdana 11 </p> <p style="margin: 0;">Signoff is required. Please review your workspace Task List and complete any signoff tasks shown there.]</p> </div>

The **Title** field is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

As shown below, the same general configuration panel is used for both transfer signoff reminder and transfer signoff exceeded notification types, though the **Type of Notification** and notification frequency field differ.

My Workspaces Vivarium Setup Internal & External Transfer Coordinator Signoff Notification Back

Insert Merge Code Save Notification

Type of Notification: Internal & External Transfer Coordinator Signoff Reminder Notification

Title: Transfer Coordinator Signoff Required

Notify every ? Days: 1 in days.

Send E-Mail Notification: Yes No

E-mail Content: + Transfer Coordinator signoff is required. Please review your Task List and complete any signoff tasks. [%rb_name%]

The **Title** field is used as the subject line in the notification e-mail.

In a transfer signoff *reminder* notification type the notify frequency field is **Notify every ? Days** (shown in the screenshot above). This field specifies how frequently the reminder is to be re-sent until signoff is complete.

In a transfer signoff *exceeded* notification type the notify frequency field is **Notify when signoff has not been completed within ? Days** (shown below). This field specifies the notification is to be sent ? Days after the due date.

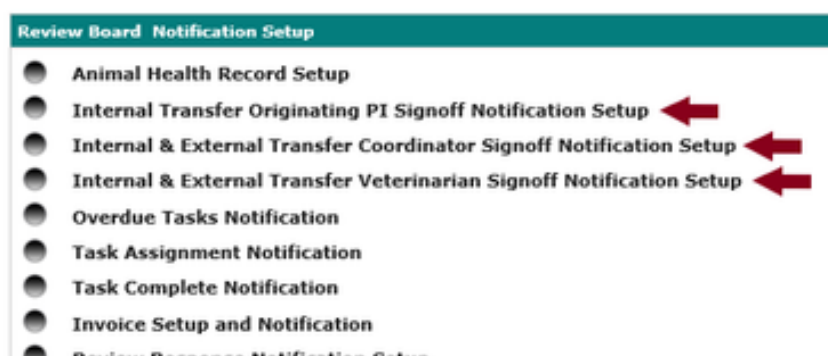
Notify when signoff has not been completed within ? Days 5 in days.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. See the *Using Merge Codes in Notifications* section of this manual for more information.

Configure Transfer Signoff Notification

Navigate to Animal Resource Center > Review Board Administration > [applicable setup link].



The contents of the respective setup pages are the same for all three roles, and each contains options to configure four notification types.

My Workspaces Vivarium **Setup Internal & External Transfer Coordinator Signoff Notification** 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	Not Defined	Not Defined	Add 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 Required	Yes	Delete Notification
	Internal & External Transfer Coordinator Signoff Exceeded Notification	Not Defined	Not Defined	Not Defined	Add Notification

As illustrated by the screenshot above:

- only one version of each notification type can be configured, no add button is provided for notification types that are already configured (red boxes)
- until a notification type is configured, its **Title**, **Send E-Mail Notification**, and **When to Notify** (where applicable) fields are set to “Not Defined” and an add button is provided for the notification (red boxes)
- after a notification type is configured, its **Title**, **Send E-Mail Notification**, and **When to Notify** (where applicable) fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

As shown in the screenshot below, the two (2) types of transfer signoff notification are accessed in the upper portion of the screen.

My Workspaces Vivarium **Setup Internal & External Transfer Coordinator Signoff Notification** 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	Not Defined	Not Defined	Add 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 Required	Yes	Delete Notification
	Internal & External Transfer Coordinator Signoff Exceeded Notification	Not Defined	Not Defined	Not Defined	Add Notification

Click the applicable **Add Notification** button. A panel opens for configuration of the notification.

The configuration panel for each of the two notification types contains the same fields. However, the **Type of Notification** field reads “[User Role] Signoff Notification” for signoff notifications and “[User Role] Signoff Denial Notification” for signoff denial notifications.

Enter the desired subject line of the notification email in the **Title** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is configured on the applicable notification setup page.

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	Signoff Denied	Yes	Delete Notification

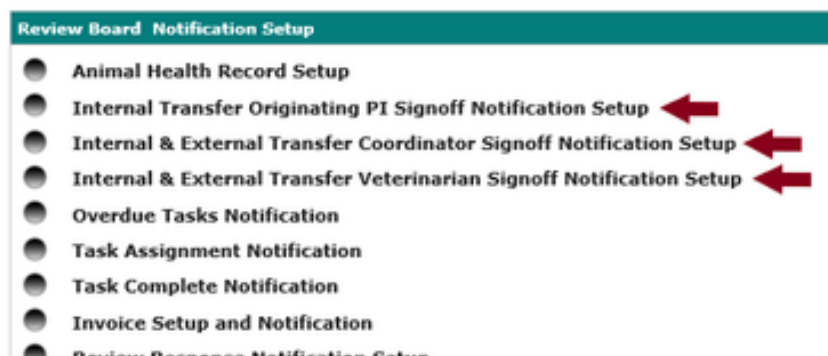
Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Internal & External Transfer Coordinator Signoff Reminder Notification	Notify every 1 Days	Transfer Coordinator Signoff Required	Yes	Delete Notification
	Internal & External Transfer Coordinator Signoff Exceeded Notification	Not Defined	Not Defined	Not Defined	Add Notification

Notice that a **Delete Notification** button now appears in place of the **Add Notification** button, indicating that no additional versions of this notification type can be created. This is the case for both transfer signoff notification types when configured.

Also notice that an icon is now available in the **Edit** column for the configured notification, indicating that it can be revised. This is the case for both transfer signoff notification types when configured.


Edit Transfer Signoff Notification


Navigate to Animal Resource Center > Review Board Administration > [applicable setup link].



The contents of the respective setup pages are the same for all three roles, and each contains options to configure four notification types.

My Workspaces ▼ Vivarium Setup Internal & External Transfer Coordinator Signoff Notification 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	Not Defined	Not Defined	Add 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 Required	Yes	Delete Notification
	Internal & External Transfer Coordinator Signoff Exceeded Notification	Not Defined	Not Defined	Not Defined	Add Notification


As illustrated by the screenshot above:


- only one version of each notification type can be configured, no add button is provided for notification types that are already configured (red boxes)
- until a notification type is configured, its **Title**, **Send E-Mail Notification**, and **When to Notify** (where applicable) fields are set to “Not Defined” and an add button is provided for the notification (red boxes)
- after a notification type is configured, its **Title**, **Send E-Mail Notification**, and **When to Notify** (where applicable) fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

As shown in the screenshot below, the two (2) types of transfer signoff notification are accessed in the upper portion of the screen.

My Workspaces ▼ Vivarium Setup Internal & External Transfer Coordinator Signoff Notification 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	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 Required	Yes	Delete Notification
	Internal & External Transfer Coordinator Signoff Exceeded Notification	Not Defined	Not Defined	Not Defined	Add Notification

Click the icon in the **Edit** column for the applicable notification. The selected notification is opened in a configuration panel.

My Workspaces ▾ Vivarium Setup Internal & External Transfer Coordinator Signoff Notification Back

Insert Merge Code Save Notification

Type of Notification:	Internal & External Transfer Coordinator Signoff Denial Notification
Title:	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>The [%rb_name%] has denied your signoff pending fulfillment of the following stipulation(s): [%sub_stips_1%]</p> <p>Please make requested changes and resubmit.</p> </div>

The configuration panel for each of the two notification types contains the same fields. However, the **Type of Notification** field reads “[User Role] Signoff Notification” for signoff notifications and “[User Role] Signoff Denial Notification” for signoff denial notifications.

Make desired changes in the configuration panel fields.

The **Title** field is used as the subject line in the notification e-mail.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Code changes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel.

My Workspaces ▾ Vivarium Setup Internal & External Transfer Coordinator Signoff Notification Back

Insert Merge Code **Save Notification**

Type of Notification:	Internal & External Transfer Coordinator Signoff Denial Notification
Title:	Transfer Signoff Denied
Send E-Mail Notifications:	<input checked="" type="radio"/> Yes <input type="radio"/> No
E-mail Content:	<div style="border: 1px solid #ccc; padding: 5px;"> <p>The [%rb_name%] has denied your signoff pending fulfillment of the following stipulation(s): [%sub_stips_1%]</p> <p>Please make requested changes and resubmit.</p> </div>

The notification is revised on the applicable notification setup page.

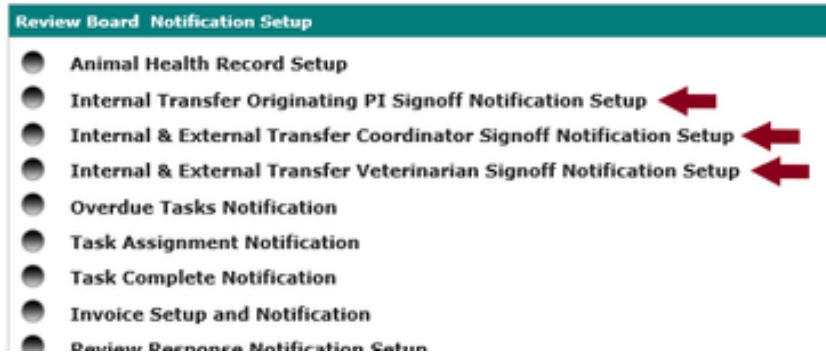
My Workspaces ▼ Vivarium **Setup Internal & External Transfer Coordinator Signoff Notification** 1 [Back](#)

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 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 Required	Yes	Delete Notification
	Internal & External Transfer Coordinator Signoff Exceeded Notification	Not Defined	Not Defined	Not Defined	Add Notification

Delete Transfer Signoff Notification

Navigate to Animal Resource Center > Review Board Administration > [applicable setup link].



The contents of the respective setup pages are the same for all three roles, and each contains options to configure four notification types.

My Workspaces ▼ Vivarium **Setup Internal & External Transfer Coordinator Signoff Notification** 1 [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	Not Defined	Not Defined	Add 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 Required	Yes	Delete Notification
	Internal & External Transfer Coordinator Signoff Exceeded Notification	Not Defined	Not Defined	Not Defined	Add Notification

As illustrated by the screenshot above:

— only one version of each notification type can be configured, no add button is provided for notification types that are already configured (red boxes)

— until a notification type is configured its **Title**, **Send E-Mail Notification**, and **When to Notify** (where applicable) fields are set to “Not Defined” and an add button is provided for the notification (red boxes)

— after a notification type is configured its **Title**, **Send E-Mail Notification**, and **When to Notify** (where applicable) fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

As shown in the screenshot below, the two (2) types of transfer signoff notification are accessed in the upper portion of the screen.

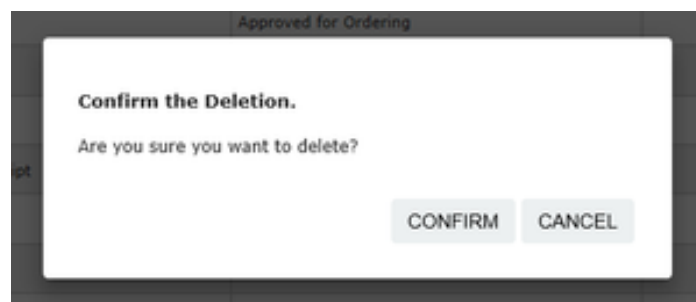
Edit	Type	Title	Send E-mail Notification	Action
	Internal & External Transfer Coordinator Signoff Notification	Transfer Coordinator Signoff Required	Yes	Delete Notification
	Internal & External Transfer Coordinator Signoff Denial Notification	Transfer Signoff Denied	Yes	Delete Notification

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 Required	Yes	Delete Notification
	Internal & External Transfer Coordinator Signoff Exceeded Notification	Not Defined	Not Defined	Not Defined	Add Notification

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

Click the **Delete Notification** button for the applicable notification.

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 selected notification type is now unconfigured on the applicable notification setup page.

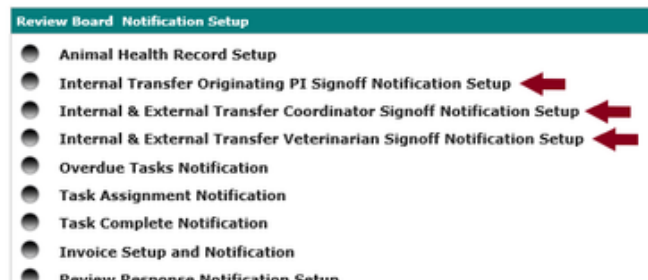
Edit	Type	Title	Send E-mail Notification	Action
	Internal & External Transfer Coordinator Signoff Notification	Transfer Coordinator Signoff Required	Yes	Delete Notification
	Internal & External Transfer Coordinator Signoff Denial Notification	Not Defined	Not Defined	Add Notification

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 Required	Yes	Delete Notification
	Internal & External Transfer Coordinator Signoff Exceeded Notification	Not Defined	Not Defined	Not Defined	Add Notification

Notice that the **Edit** icon and **Delete Notification** button no longer appear, and an **Add Notification** button is provided for the now-unconfigured notification type.

Configure Transfer Signoff Reminder Notification

Navigate to Animal Resource Center > Review Board Administration > [applicable setup link].



The contents of the respective setup pages are the same for all three roles, and each contains options to configure four notification types. Click the applicable link to open the respective notification setup page.

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	Not Defined	Not Defined	Add 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 Required	Yes	Delete Notification
	Internal & External Transfer Coordinator Signoff Exceeded Notification	Not Defined	Not Defined	Not Defined	Add Notification

As illustrated by the screenshot above:

— only one version of each notification type can be configured, no add button is provided for notification types that are already configured (red boxes)

— until a notification type is configured its **Title**, **Send E-Mail Notification**, and **When to Notify** (where applicable) fields are set to “Not Defined” and an add button is provided for the notification (red boxes)

— after a notification type is configured its **Title**, **Send E-Mail Notification**, and **When to Notify** (where applicable) fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

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	Not Defined	Not Defined	Add Notification

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Internal & External Transfer Coordinator Signoff Reminder Notification	Not Defined	Not Defined	Not Defined	Add Notification
	Internal & External Transfer Coordinator Signoff Exceeded Notification	Not Defined	Not Defined	Not Defined	Add Notification

As shown in the screenshot above, transfer signoff reminder notification types are accessed in the lower portion of the screen. Click the applicable **Add Notification** button. A panel opens for configuration of the notification.

As shown below, the same general configuration panel is used for both transfer signoff *reminder* and transfer signoff *exceeded* notification types, though the **Type of Notification** title and notification frequency field differ.

My Workspaces ▾ Vivarium Setup Internal & External Transfer Coordinator Signoff Notification Back

Insert Merge Code Save Notification

Type of Notification: Internal & External Transfer Coordinator Signoff Reminder Notification

Title: Transfer Coordinator Signoff Required

Notify every 7 Days: 1 in days.

Send E-Mail Notifications: Yes No

E-mail Content: + Transfer Coordinator signoff is required. Please review your Task List and complete any signoff tasks. [%rb_name%]

As shown above, for a signoff *reminder* notification type, the **Type of Notification** field reads “[User Role] Signoff Reminder Notification”. The same field reads “[User Role] Signoff Exceeded Notification” for a signoff *exceeded* notification type.

My Workspaces ▾ Vivarium Setup Internal & External Transfer Coordinator Signoff Notification Back

Insert Merge Code Save Notification

Type of Notification:	Internal & External Transfer Coordinator Signoff Reminder Notification
Title:	Transfer Coordinator Signoff Required
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>Transfer Coordinator signoff is required. Please review your Task List and complete any signoff tasks.</p> <p>[%b_name%]</p> </div>

Enter the desired subject line of the notification email in the **Title** field.

As shown in the screenshot above, for a signoff *reminder* notification type the notification frequency field is **Notify every ? Days**. For that type of notification, enter how frequently the reminder is to be re-sent until signoff is complete, in days.

As shown in the screenshot below, for a signoff *exceeded* notification type the notification frequency field is **Notify when signoff has not been completed within ? Days** field. For that type of notification, enter the number of days after the due date the reminder is to be sent.

Notify when signoff has not been completed within ? Days 5 in days.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is configured on the applicable notification setup page.

My Workspaces ▾ Vivarium Setup Internal & External Transfer Coordinator Signoff Notification 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	Not Defined	Not Defined	Add Notification

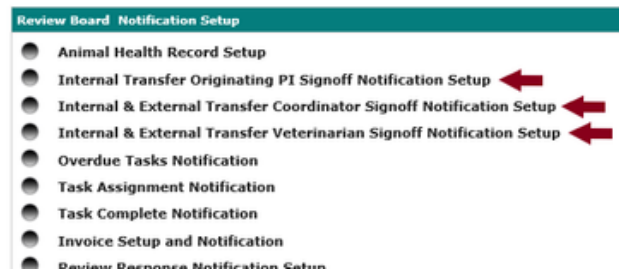
Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Internal & External Transfer Coordinator Signoff Reminder Notification	Notify every 1 Days	Transfer Coordinator Signoff Required	Yes	Delete Notification
	Internal & External Transfer Coordinator Signoff Exceeded Notification	Not Defined	Not Defined	Not Defined	Add Notification

Notice that a **Delete Notification** button now appears in place of the **Add Notification** button, indicating that no additional versions of this notification type can be created. This is the case for all signoff *reminder* and signoff *exceeded* notifications when configured.

Also notice that an icon is now available in the **Edit** column for the configured notification, indicating that it can be revised. This is the case for all signoff *reminder* and signoff *exceeded* notifications when configured.

Edit Transfer Signoff Reminder Notification

Navigate to Animal Resource Center > Review Board Administration > [applicable setup link].



The contents of the respective setup pages are the same for all three roles, and each contains options to configure four notification types. Click the applicable link to open the respective notification setup page.



As illustrated by the screenshot above:

- only one version of each notification type can be configured, no add button is provided for notification types that are already configured (red boxes)
- until a notification type is configured its **Title**, **Send E-Mail Notification**, and **When to Notify** (where applicable) fields are set to “Not Defined” and an add button is provided for the notification (red boxes)
- after a notification type is configured its **Title**, **Send E-Mail Notification**, and **When to Notify** (where applicable) fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

As shown in the screenshot below, transfer signoff reminder notification types are accessed in the lower portion of the screen.

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	Not Defined	Not Defined	Add 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 Required	Yes	Delete Notification
	Internal & External Transfer Coordinator Signoff Exceeded Notification	Not Defined	Not Defined	Not Defined	Add Notification

Click the icon in the **Edit** column for the notification. The notification is opened in a configuration panel.

As shown below, the same general configuration panel is used for both transfer signoff *reminder* and transfer signoff *exceeded* notification types, though the **Type of Notification** title and notification frequency field differ.

My Workspaces Vivarium **Setup Internal & External Transfer Coordinator Signoff Notification** Back

Type of Notification:	Internal & External Transfer Coordinator Signoff Reminder Notification
Title:	Transfer Coordinator Signoff Required
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>Verdana 11</p> <p>Transfer Coordinator signoff is required. Please review your Task List and complete any signoff tasks.</p> <p>[%rb_name%]</p> </div>

As shown above, for a signoff *reminder* notification type, the **Type of Notification** field reads “[User Role] Signoff Reminder Notification”. The same field reads “[User Role] Signoff Exceeded Notification” for a signoff *exceeded* notification type.

My Workspaces Vivarium **Setup Internal & External Transfer Coordinator Signoff Notification** Back

Insert Merge Code **Save Notification**

Type of Notification:	Internal & External Transfer Coordinator Signoff Reminder Notification
Title:	Transfer Coordinator Signoff Required
Notify every ? 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 gray; padding: 5px;"> <p>Transfer Coordinator signoff is required. Please review your Task List and complete any signoff tasks.</p> <p>[%rb_name%]</p> </div>

Make desired changes to the notification.

The **Title** field is used as the subject line in the notification e-mail.

As shown in the screenshot above, for a signoff *reminder* notification type the notification frequency field is **Notify every ? Days**. This field specifies how frequently the reminder is to be re-sent until signoff is complete, in days.

As shown in the screenshot below, for a signoff *exceeded* notification type the notification frequency field is **Notify when signoff has not been completed within ? Days**. This field contains the number of days after the due date the reminder is to be sent.

Notify when signoff has not been completed within ? Days in days.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save changes and close the configuration panel. The notification is revised on the applicable notification setup page.

Edit	Type	Title	Send E-mail Notification	Action
	Internal & External Transfer Coordinator Signoff Notification	Transfer Coordinator Signoff Required	Yes	<input type="button" value="Delete Notification"/>
	Internal & External Transfer Coordinator Signoff Denial Notification	Not Defined	Not Defined	<input type="button" value="Add 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 Required	Yes	<input type="button" value="Delete Notification"/>
	Internal & External Transfer Coordinator Signoff Exceeded Notification	Not Defined	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

Delete Transfer Signoff Reminder Notification

Navigate to Animal Resource Center > Review Board Administration > [applicable setup link].

Review Board Notification Setup

- Animal Health Record Setup
- Internal Transfer Originating PI Signoff Notification Setup
- Internal & External Transfer Coordinator Signoff Notification Setup
- Internal & External Transfer Veterinarian Signoff Notification Setup
- Overdue Tasks Notification
- Task Assignment Notification
- Task Complete Notification
- Invoice Setup and Notification
- Review Response Notification Setup

The contents of the respective setup pages are the same for all three roles, and each contains options to configure four notification types.

Edit	Type	Title	Send E-mail Notification	Action
	Internal & External Transfer Coordinator Signoff Notification	Transfer Coordinator Signoff Required	Yes	<input type="button" value="Delete Notification"/>
	Internal & External Transfer Coordinator Signoff Denial Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

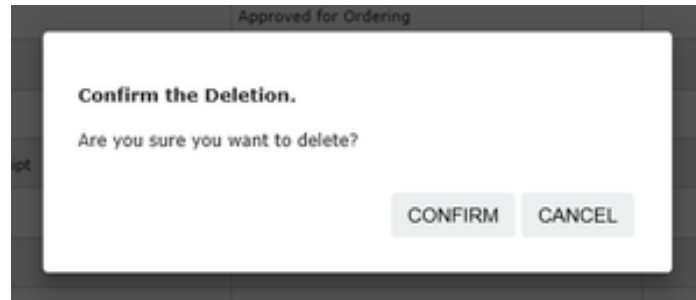
Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Internal & External Transfer Coordinator Signoff Reminder Notification	Notify every 2 Days	Transfer Coordinator Signoff Required	Yes	<input type="button" value="Delete Notification"/>
	Internal & External Transfer Coordinator Signoff Exceeded Notification	Not Defined	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

As shown in the screenshot above, transfer signoff reminder notification types are accessed in the lower portion of the screen.

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

Click the **Delete Notification** button for the applicable notification.

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 selected notification type is now unconfigured on the applicable notification setup page.



The screenshot shows the "Setup Internal & External Transfer Coordinator Signoff Notification" page. It features two tables of notification configurations.

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	Not Defined	Not Defined	Add Notification

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Internal & External Transfer Coordinator Signoff Reminder Notification	Not Defined	Not Defined	Not Defined	Add Notification
	Internal & External Transfer Coordinator Signoff Exceeded Notification	Not Defined	Not Defined	Not Defined	Add Notification

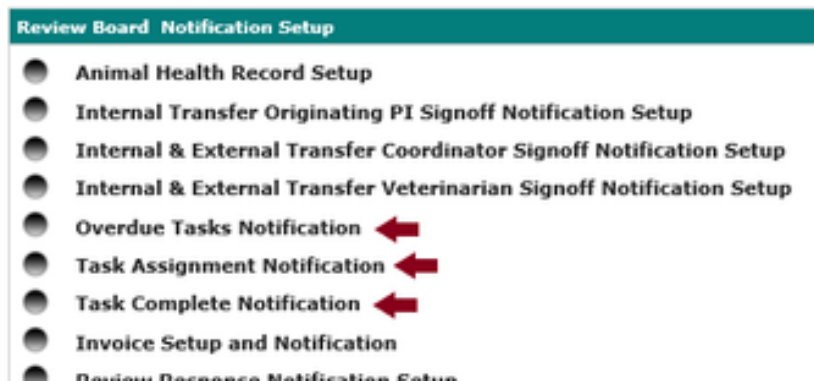
Notice that the **Edit** icon and **Delete Notification** button no longer appear, and an **Add Notification** button is provided for the now-unconfigured notification type.

Task Notifications

Task assignment, reminder, overdue and completion notifications can be configured in the iRIS™ system via a task notification setup page. When configured, these notifications are automatically sent to applicable study personnel when a task is initially assigned, assigned and not yet complete, overdue, or complete. Three separate setup pages are provided for the following four types of task notification:

- Overdue Task
- Task Assignment, Assigned Task Reminder
- Task Complete

To access the respective setup pages, navigate to Animal Resource Center > Review Board Administration > [applicable setup link].



An **Overdue Tasks Notification** is sent to applicable study personnel when an assigned task is overdue.

My Workspaces ▾ Vivarium Overdue Task Notification Back				
Edit	Type	Title	Send E-mail Notification	Action
	Overdue Task Notification	Overdue Task	Yes	Delete Notification

A **Task Assignment Notification** is sent to applicable study personnel when a task is assigned to them, and an Assigned Task Reminder Notification is sent to applicable study personnel when their assigned task is not yet complete.

My Workspaces ▾ Vivarium Task Assignment Notification Back				
Edit	Type	Title	Send E-mail Notification	Action
	Task Assignment Notification	Not Defined	Not Defined	Add Notification
	Assigned Task Reminder Notification	Not Defined	Not Defined	Add Notification

A **Task Complete Notification** is sent to applicable study personnel when their assigned task is accepted as complete.


My Workspaces ▾ Vivarium Task Complete Notification Back				
Edit	Type	Title	Send E-mail Notification	Action
	Task Complete Notification	Not Defined	Not Defined	Add Notification

As shown in the screenshot below:

— only one version of each notification type can be configured, no add button is provided for notification types that are already configured

— until a notification type is configured its **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and an add button is provided for the notification (red box)

— after a notification type is configured its **Title** and **Send E-Mail Notification** fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

Edit	Type	Title	Send E-mail Notification	Action
	Task Assignment Notification	Task Assigned	Yes	Delete Notification
	Assigned Task Reminder Notification	Not Defined	Not Defined	Add Notification

The same configuration form is used for all four task notification types.

My Workspaces Vivarium **Edit Task Assignment Notification** Back

Insert Merge Code Save Notification

Type of Notification: Task Assignment Notification

Title: Task Assigned

Send E-Mail Notification: Yes No

Send To: Add Delete
 Harper, Jill H, M.D., PhD

E-mail Content:
You have a new assigned task. Please review your Task List and complete any outstanding items.
[%rb_name%]

The **Title** field is used as the subject line in the notification e-mail.

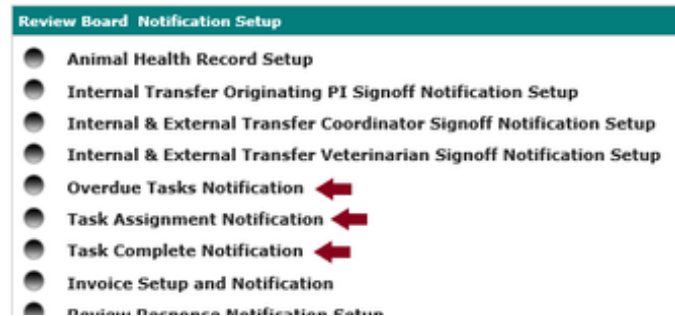
If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

The **Add** button opens a user search form for lookup and selection of one or more specific iRIS™ users to receive the notification.

Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

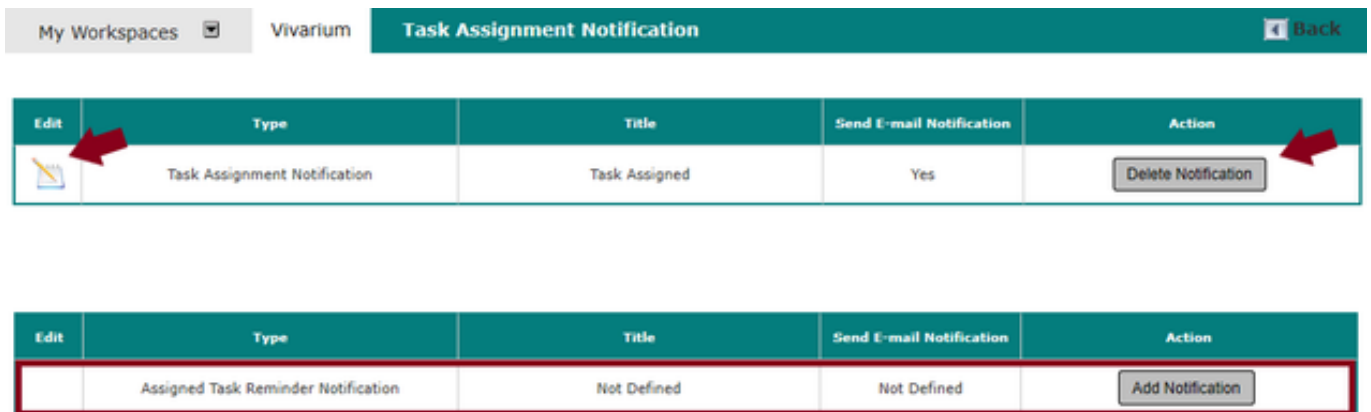
Configure Task Notification

Navigate to Animal Resource Center > Review Board Administration > [applicable setup link].



Note that the task assignment notification and assigned task reminder notification are both configured via the **Task Assignment Notification** link.

The applicable task notification setup page opens.



As shown in the screenshot above:

- only one version of each notification type can be configured, no add button is provided for notification types that are already configured
- until a notification type is configured its **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and an add button is provided for the notification (red box)
- after a notification type is configured its **Title** and **Send E-Mail Notification** fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

Click the applicable **Add Notification** button. In this example, a **Task Assignment Notification** is being configured.

Edit	Type	Title	Send E-mail Notification	Action
	Task Assignment Notification	Not Defined	Not Defined	<button>Add Notification</button>
	Assigned Task Reminder Notification	Not Defined	Not Defined	<button>Add Notification</button>

A configuration panel is opened for the notification. The same configuration panel is used for all four task notification types.

My Workspaces ▾ Vivarium
Task Assignment Notification
⌂ Back

Insert Merge Code
Save Notification

Type of Notification:	Task Assignment Notification
Title:	<input type="text" value="Task Assigned"/>
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Send To:	Add
E-mail Content:	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="font-size: 0.9em; margin-bottom: 5px;"> ↶ B <i>I</i> <u>U</u> S x_2 x^2 Font Family 12 </div> <div style="border-bottom: 1px solid #ccc; height: 40px;"></div> </div>

Enter the desired subject line of the notification email in the **Title** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Click the **Add** button to select one or more specific iRIS™ users to receive the notification. The **Search User Directory** page opens for user lookup and selection.

My Workspaces ▾ Vivarium
Search User Directory
⌂ Back

Directory
Browse/Find:

(You may enter a partial name to search)

by

Find

(search results display here)

As shown in the screenshot above, the user directory can be searched by full or partial **Last Name** or **First Name**, by **Department**, or by any combination of the three. Enter desired search criteria in the top section of the form and click the **Find** button. Search results display in the lower part of the page.

Check for Multiple	Select User	Training	User Name	Department	Email
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Harper, Jill M, M.D., PhD		jharp@msc.edu

Click the checkmark icon in the **Select User** column to add a single user to the notification distribution list.

The results list may include multiple names of iRIS™ users to be added to the distribution list. In that case select the checkbox(es) at far left for all applicable users and click the **Save Selected User(s)** button. The selected user(s) are added in the **Send To** field of the configuration panel.

Type of Notification: Task Assignment Notification

Title: Task Assigned

Send E-Mail Notification: Yes No

Send To: Harper, Jill M, M.D., PhD

E-mail Content:

If a user is added in error, select the checkbox to the left of that user's name and click the **Delete** button to remove the user from distribution.

As shown below, desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*


My Workspaces Vivarium **Edit Task Assignment Notification** [Back](#)

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

Type of Notification:	Task Assignment Notification
Title:	<input type="text" value="Task Assigned"/>
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Send To:	<input type="button" value="Add"/> <input type="button" value="Delete"/> <input type="checkbox"/> Harpec, Jill H, M.D., PhD
E-mail Content:	<div style="border: 1px solid gray; padding: 5px;"> <p>You have a new assigned task. Please review your Task List and complete any outstanding items.</p> <p>{%first_name%}</p> </div>

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is configured on the applicable task notification setup page.

My Workspaces Vivarium **Task Assignment Notification** [Back](#)

Edit	Type	Title	Send E-mail Notification	Action
	Task Assignment Notification	Task Assigned	Yes	<input type="button" value="Delete Notification"/>
	Assigned Task Reminder Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>



Notice that a **Delete Notification** button now appears in place of the **Add Notification** button, indicating that no additional versions of this notification type can be created. This is the case for all task assignment notifications when configured.

Also notice that an icon is now available in the **Edit** column for the configured notification, indicating that it can be revised. This is the case for all task assignment notifications when configured.

Edit Task Notification


Navigate to Animal Resource Center > Review Board Administration > [applicable setup link].

Review Board Notification Setup

- Animal Health Record Setup
- Internal Transfer Originating PI Signoff Notification Setup
- Internal & External Transfer Coordinator Signoff Notification Setup
- Internal & External Transfer Veterinarian Signoff Notification Setup
- Overdue Tasks Notification 
- Task Assignment Notification 
- Task Complete Notification 
- Invoice Setup and Notification
- Review Response Notification Setup

Note that the Task Assignment Notification and Assigned Task Reminder Notification are both configured via the **Task Assignment Notification** link.

The applicable task notification page opens.


Edit	Type	Title	Send E-mail Notification	Action
	Task Assignment Notification	Task Assigned	Yes	Delete Notification

Edit	Type	Title	Send E-mail Notification	Action
	Assigned Task Reminder Notification	Not Defined	Not Defined	Add Notification

As shown in the screenshot above:

- only one version of each notification type can be configured, no add button is provided for notification types that are already configured
- until a notification type is configured its **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and an add button is provided for the notification (red box)
- after a notification type is configured its **Title** and **Send E-Mail Notification** fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

In this example, a **Task Assignment Notification** is being revised. Click the icon in the **Edit** column for the applicable notification.

Edit	Type	Title	Send E-mail Notification	Action
	Task Assignment Notification	Task Assigned	Yes	Delete Notification

Edit	Type	Title	Send E-mail Notification	Action
	Assigned Task Reminder Notification	Not Defined	Not Defined	Add Notification

The notification is opened in an edit panel. The same edit panel is used for all four task notification types.

My Workspaces ▼ Vivarium **Edit Task Assignment Notification** ⏪ Back

Insert Merge Code Save Notification

Type of Notification:	Task Assignment Notification
Title:	Task Assigned
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Send To:	<input checked="" type="checkbox"/> Harper, Jill M, M.D., PhD <input type="checkbox"/> Delete
E-mail Content:	<div style="border: 1px solid #ccc; padding: 5px;"> <p>You have a new assigned task. Please review your Task List and complete any outstanding items.</p> <p>[%rb_name%]</p> </div>

Make desired changes to the notification.

The **Title** field is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Click the **Add** button to select one or more specific iRIS™ users to receive the notification. The **Search User Directory** page opens for user lookup and selection.

My Workspaces ▼ Vivarium **Search User Directory** ⏪ Back

Directory Browse/Find:

Last Name: (You may enter a partial name to search)

First Name:

by Department:

(search results display here)

As shown in the screenshot above, the user directory can be searched by full or partial **Last Name** or **First Name**, by **Department**, or by any combination of the three. Enter desired search criteria in the top section of the form and click the **Find** button. Search results display in the lower part of the page.

My Workspaces ▼ Vivarium **Search User Directory** ⏪ Back

Directory Browse/Find:

Last Name: (You may enter a partial name to search)

First Name:

by Department:

Check for Multiple	Select User	Training	User Name	Department	Email
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Harper, Jill M, M.D., PhD		jharp@msc.edu

↑ ↑

Click the checkmark icon in the **Select User** column to add a single user to the notification distribution list.

The results list may include multiple names of iRIS™ users to be added to the distribution list. In that case select the checkbox(es) at far left for all applicable users and click the **Save Selected User(s)** button. The selected user(s) is (are) added in the **Send To** field of the notification edit panel.

The screenshot shows the 'Edit Task Assignment Notification' interface. At the top, there are tabs for 'My Workspaces' and 'Vivarium', and a title bar 'Edit Task Assignment Notification' with a 'Back' button. Below the title bar are two buttons: 'Insert Merge Code' and 'Save Notification'. The main form has several sections: 'Type of Notification' (Task Assignment Notification), 'Title' (Task Assigned), 'Send E-Mail Notification' (Yes/No radio buttons), 'Send To' (Add/Delete buttons and a list of users with checkboxes), and 'E-mail Content' (a rich text editor with a toolbar and boilerplate text including a merge code placeholder [%b_name%]).

If a user is added in error, select the checkbox to the left of that user's name and click the **Delete** button to remove the user from distribution.

As shown below, desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. See the *Using Merge Codes in Notifications* section of this manual for more information.

This screenshot is similar to the previous one but highlights the 'Save Notification' button with a red box. The 'Send To' field now shows a checked checkbox next to the user 'Harper, Jill H, M.D., PhD'. The 'E-mail Content' field contains the same boilerplate text and merge code placeholder as in the previous screenshot.

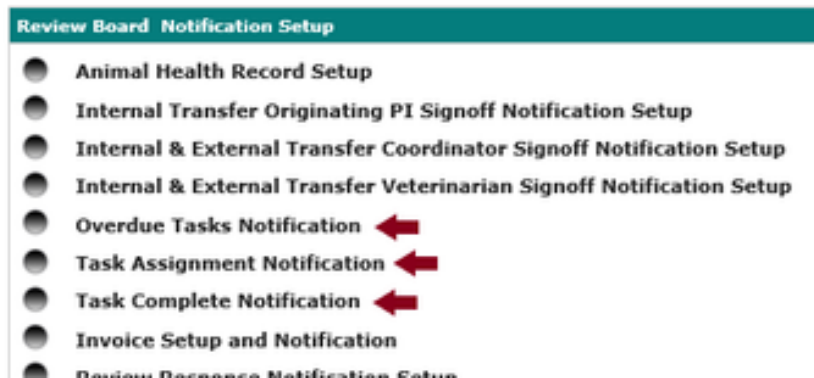
Click the **Save Notification** button to save changes and close the edit panel. The notification is revised on the applicable task notification setup page.

Edit	Type	Title	Send E-mail Notification	Action
	Task Assignment Notification	Task Assignment	Yes	<input type="button" value="Delete Notification"/>

Edit	Type	Title	Send E-mail Notification	Action
	Assigned Task Reminder Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

Delete Task Notification

Navigate to Animal Resource Center > Review Board Administration > [applicable setup link].



Note that the Task Assignment Notification and Assigned Task Reminder Notification are both configured via the **Task Assignment Notification** link.

The applicable task notification page opens.

Edit	Type	Title	Send E-mail Notification	Action
	Task Assignment Notification	Task Assigned	Yes	<input type="button" value="Delete Notification"/>

Edit	Type	Title	Send E-mail Notification	Action
	Assigned Task Reminder Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

As shown in the screenshot above:

— only one version of each notification type can be configured, no add button is provided for notification types that are already configured

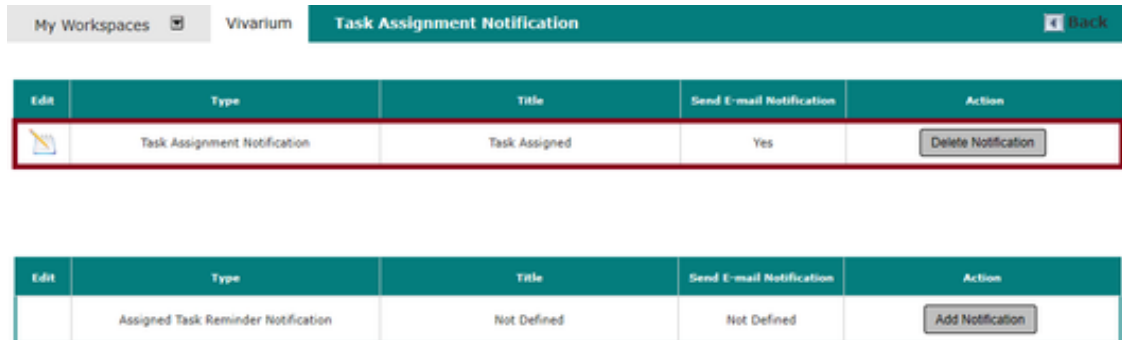
— until a notification type is configured its **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and an add button is provided for the notification (red box)


— after a notification type is configured its **Title** and **Send E-Mail Notification** fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

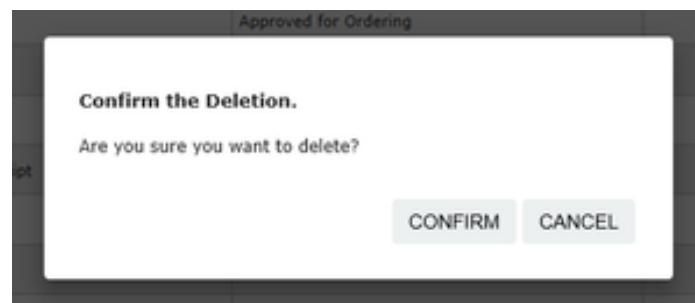
Click the **Delete Notification** button for the applicable notification.

In this example, a **Task Assignment Notification** is being deleted.



Edit	Type	Title	Send E-mail Notification	Action
	Task Assignment Notification	Task Assigned	Yes	Delete Notification
	Assigned Task Reminder Notification	Not Defined	Not Defined	Add Notification

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



Click **CANCEL** to close the popup without deleting the notification configuration.

Click **CONFIRM** to delete the notification configuration and close the popup. The selected notification type is now unconfigured on the applicable task notification setup page.

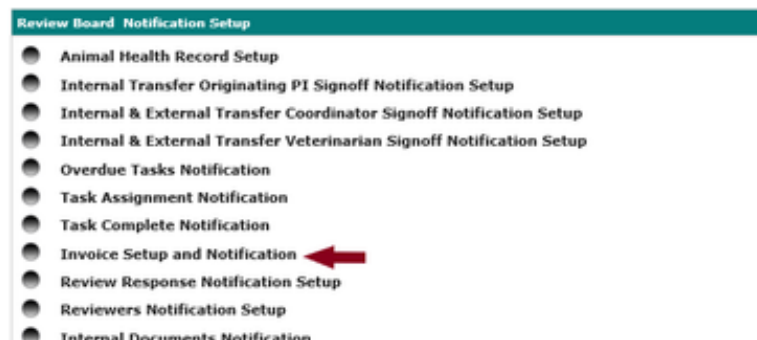
Edit	Type	Title	Send E-mail Notification	Action
	Task Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

Edit	Type	Title	Send E-mail Notification	Action
	Assigned Task Reminder Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

Notice that the **Edit** icon and **Delete Notification** button no longer appear, and an **Add Notification** button is provided for the now-unconfigured notification type.

Invoice Setup and Notification

The iRIS™ system enables setup of a standardized notification tied to invoices, such that when an invoice is generated applicable study personnel are automatically notified. To access the setup page, navigate to Animal Resource Center > Review Board Administration > **Invoice Setup and Notification** link.



The **Invoice Setup and Notification** page opens.

My Workspaces Vivarium **Invoice Setup and Notification** Back

Setup Invoice PDF Template

Select Invoice PDF Template:

Email Notification Setup

Edit	Type	Title	Send E-mail Notification	Action
	Cost Center Email Notification	Notification of Cost Center Charges	Yes	<input type="button" value="Delete Notification"/>

In the example shown above, the notification is configured.

Notice that there is no add button provided in the **Email Notification Setup** area of the page, indicating that only one such notification can be configured at any time and is used for *all* invoices where notification is desired.

An **Edit** icon and **Delete Notification** button are provided for the email notification when it is configured.

As shown in the example below, when the email notification is unconfigured the **Type** field defaults to “Invoice Setup and Notification”, the **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and the **Edit** icon and **Delete Notification** button are removed. An **Add Notification** button appears in place of the **Delete Notification** button.

The screenshot shows the 'Invoice Setup and Notification' page. At the top, there are navigation elements: 'My Workspaces' with a dropdown arrow, 'Vivarium', and a 'Back' button. Below this is a section titled 'Setup Invoice PDF Template' containing a 'Save Template' button and a dropdown menu labeled 'Select Invoice PDF Template' with 'ARC Study Billing Template' selected. The main section is 'Email Notification Setup', which is a table with the following structure:

Edit	Type	Title	Send E-mail Notification	Action
	Invoice Setup and Notification	Not Defined	Not Defined	Add Notification

Red arrows point to the 'Title' and 'Send E-mail Notification' fields, and a red box highlights the 'Add Notification' button.

The **Select Invoice PDF Template** field on the upper part of the page includes a dropdown list of available invoice PDF templates, as shown in the screenshot below.

This screenshot is similar to the previous one but shows the dropdown menu for the 'Select Invoice PDF Template' field. The dropdown is open, showing three options: '---None---', 'ARC Study Billing Template', and 'Study Billing Template'. The 'ARC Study Billing Template' option is highlighted. The 'Email Notification Setup' table below now shows a configured notification:

Edit	Type	Title	Send E-mail Notification	Action
	Cost Center Email Notification	Notification of Cost Center Charges	Yes	Delete Notification

Note: Invoice templates are configured via iRIS™ > System Administration > Site List Setup tab > Finance Setup section > Define Study Invoice Templates link.

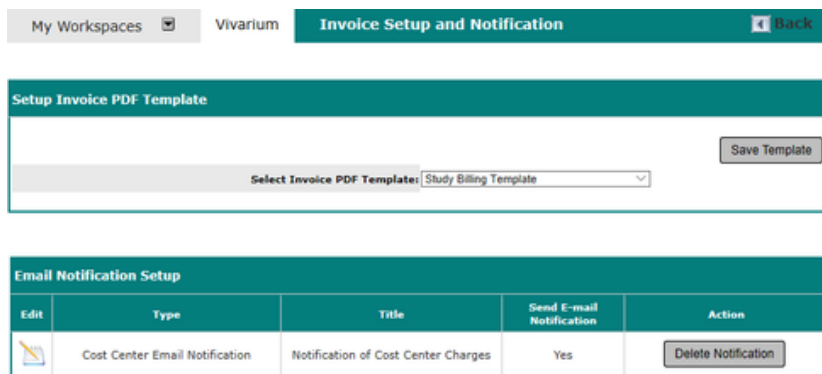
A notification is configured on the bottom part of the page, then an invoice template is selected from the dropdown list in the upper part of the page and the **Save Template** button is clicked to associate the notification with the selected template.

Configure Invoice Setup and Notification

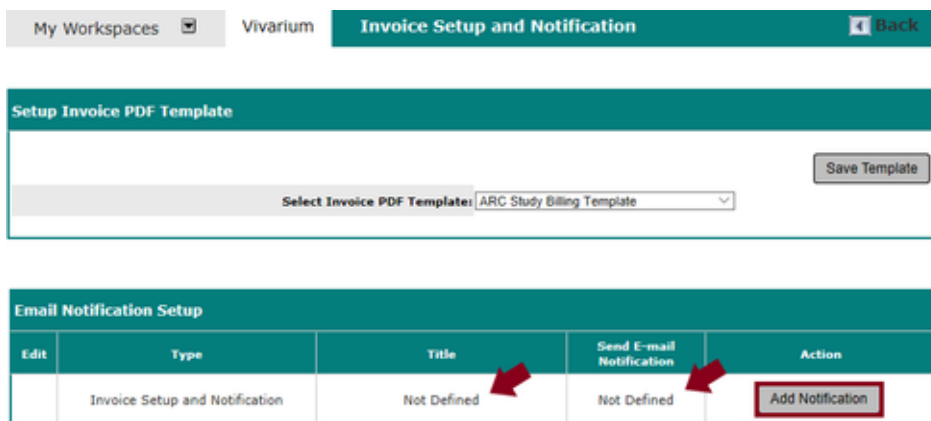
Navigate to Animal Resource Center > Review Board Administration > **Invoice Setup and Notification** link.



The **Invoice Setup and Notification** page opens. In the example shown below, the notification is configured.



Notice that there is no add button provided in the **Email Notification Setup** area of the page, indicating that only one such notification can be configured at any time and is used for *all* invoices where notification is desired. An **Edit** icon and **Delete Notification** button are provided for the email notification when it is configured.



In the screenshot below, the notification is unconfigured.

Edit	Type	Title	Send E-mail Notification	Action
	Invoice Setup and Notification	Not Defined	Not Defined	Add Notification

When the email notification is unconfigured the **Type** field defaults to “Invoice Setup and Notification”, the **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and the **Edit** icon and **Delete Notification** button are removed. An **Add Notification** button appears in place of the **Delete Notification** button.

Click the **Add Notification** button.

The **Setup Cost Center Email Notification** page opens for configuration of the notification.

The **Type of Notification** field is set to “Cost Center Email Notification”.

Enter the desired subject line of the notification email in the **Title** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*


Click the **Save Notification** button to save the configuration and close the **Setup Cost Center Email Notification** page. The notification is configured on the **Invoice Setup and Notification** page.

My Workspaces ▾ Vivarium Invoice Setup and Notification ⌂ Back

Setup Invoice PDF Template

Select Invoice PDF Template: ARC Study Billing Template Save Template

Email Notification Setup

Edit	Type	Title	Send E-mail Notification	Action
	Cost Center Email Notification	ARC Study Invoice Generated	Yes	Delete Notification

Notice that a **Delete Notification** button now appears in place of the **Add Notification** button, indicating that no additional versions of this notification type can be created. This is the case for all invoice setup notifications when configured.

Also notice that an icon is now available in the **Edit** column for the configured notification, indicating that it can be revised. This is the case for all invoice setup notifications when configured.

Select the desired invoice template in the **Selected Invoice PDF Template** dropdown list, then click the **Save Template** button to associate the configured notification with the invoice template.

The **Invoice Setup and Notification** page reloads with the selected template still selected in the **Select Invoice PDF Template** field.

My Workspaces ▾ Vivarium Invoice Setup and Notification ⌂ Back

Setup Invoice PDF Template

Select Invoice PDF Template: ARC Study Billing Template Save Template


Email Notification Setup

Edit	Type	Title	Send E-mail Notification	Action
	Cost Center Email Notification	ARC Study Invoice Generated	Yes	Delete Notification

Edit Invoice Notification

Navigate to Animal Resource Center > Review Board Administration > **Invoice Setup and Notification** link.

Review Board Notification Setup

- Animal Health Record Setup
- Internal Transfer Originating PI Signoff Notification Setup
- Internal & External Transfer Coordinator Signoff Notification Setup
- Internal & External Transfer Veterinarian Signoff Notification Setup
- Overdue Tasks Notification
- Task Assignment Notification
- Task Complete Notification
- Invoice Setup and Notification 
- Review Response Notification Setup
- Reviewers Notification Setup
- Internal Documents Notification

The **Invoice Setup and Notification** page opens. In the screenshot below, the notification is unconfigured.

The screenshot shows the 'Invoice Setup and Notification' page. At the top, there is a breadcrumb trail: 'My Workspaces' > 'Vivarium' > 'Invoice Setup and Notification'. Below this is a 'Setup Invoice PDF Template' section with a dropdown menu labeled 'Select Invoice PDF Template:' set to '--none--' and a 'Save Template' button. The 'Email Notification Setup' section is a table with the following data:

Edit	Type	Title	Send E-mail Notification	Action
	Invoice Setup and Notification	Not Defined	Not Defined	Add Notification

When the email notification is unconfigured the **Type** field defaults to “Invoice Setup and Notification”, the **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and the **Edit** icon and **Delete Notification** button are removed. An **Add Notification** button appears in place of the **Delete Notification** button.

In the example shown below, the notification is configured.

The screenshot shows the 'Invoice Setup and Notification' page with the notification configured. The 'Setup Invoice PDF Template' section has a dropdown menu labeled 'Select Invoice PDF Template:' set to 'Study Billing Template' and a 'Save Template' button. The 'Email Notification Setup' section is a table with the following data:

Edit	Type	Title	Send E-mail Notification	Action
	Cost Center Email Notification	Notification of Cost Center Charges	Yes	Delete Notification

Notice that there is no add button provided in the **Email Notification Setup** area of the page, indicating that only one such notification can be configured at any time and is used for *all* invoices where notification is desired. An **Edit** icon and **Delete Notification** button are provided for the email notification when it is configured.


Click the icon in the **Edit** column of the **Email Notification Setup** section of the page.

My Workspaces ▾ Vivarium Invoice Setup and Notification Back

Setup Invoice PDF Template

Select Invoice PDF Template: ARC Study Billing Template Save Template

Email Notification Setup

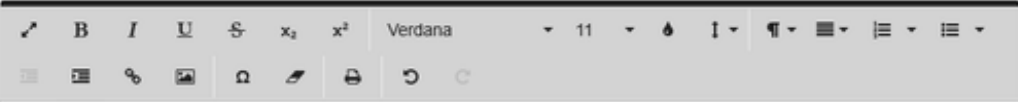
Edit	Type	Title	Send E-mail Notification	Action
	Cost Center Email Notification	ARC Study Invoice Generated	Yes	Delete Notification

Note that it does not matter which invoice template, if any, is currently selected in the **Select Invoice PDF Template** field. The process described in this section is specific to the notification itself. Any pre-existing association(s) between the notification and invoice template(s) remain in place, though going forward the revised version of the notification will be sent when associated invoices are generated.

The notification is opened for editing in the **Setup Cost Center Email Notification** page. Make desired changes to the notification.

My Workspaces ▾ Vivarium **Setup Cost Center Email Notification** Back

Insert Merge Code Save Notification

Type of Notification:	Cost Center Email Notification
Title:	<input type="text" value="ARC Study Invoice Generated"/>
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>  </p> <p>An invoice has been generated under ARC study account number [%study_account_number%]. [%rb_name%]</p> </div>

The **Title** field is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. See the *Using Merge Codes in Notifications* section of this manual for more information.


Click the **Save Notification** button to save changes and close the **Setup Cost Center Email Notification** page. The notification is revised on the **Invoice Setup and Notification** page.

My Workspaces ▾ Vivarium Invoice Setup and Notification ← Back

Setup Invoice PDF Template

Select Invoice PDF Template: ARC Study Billing Template ▾ Save Template


Email Notification Setup

Edit	Type	Title	Send E-mail Notification	Action
	Cost Center Email Notification	ARC Study Invoice Notification	Yes	Delete Notification

Delete Invoice Notification

Navigate to Animal Resource Center > Review Board Administration > **Invoice Setup and Notification** link.

Review Board Notification Setup

- Animal Health Record Setup
- Internal Transfer Originating PI Signoff Notification Setup
- Internal & External Transfer Coordinator Signoff Notification Setup
- Internal & External Transfer Veterinarian Signoff Notification Setup
- Overdue Tasks Notification
- Task Assignment Notification
- Task Complete Notification
- Invoice Setup and Notification 
- Review Response Notification Setup
- Reviewers Notification Setup
- Internal Documents Notification


The **Invoice Setup and Notification** page opens.

My Workspaces ▾ Vivarium Invoice Setup and Notification ← Back

Setup Invoice PDF Template

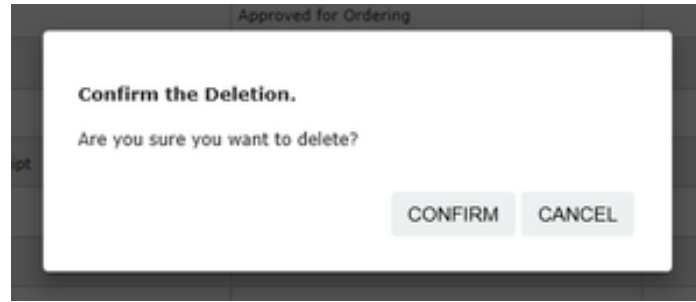
Select Invoice PDF Template: Study Billing Template ▾ Save Template

Email Notification Setup

Edit	Type	Title	Send E-mail Notification	Action
	Cost Center Email Notification	Notification of Cost Center Charges	Yes	Delete Notification

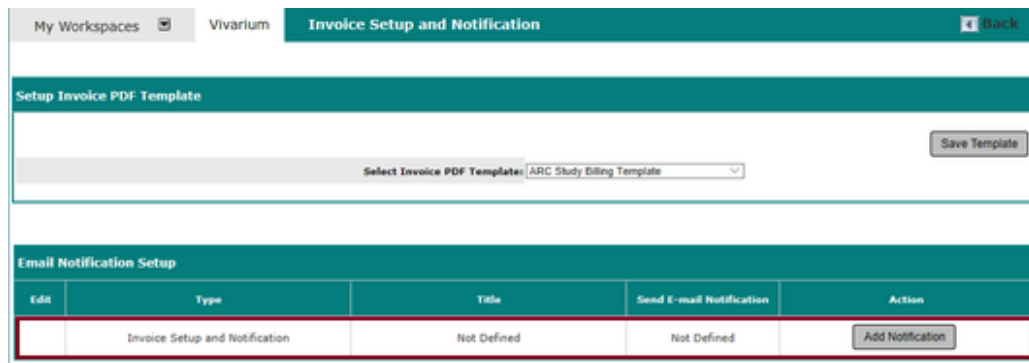
CAUTION: Deleting a configured invoice notification de-configures the notification and removes its association from any invoice templates with which it has previously been associated. Until the notification is reconfigured, no notification will be sent when invoice templates previously associated with the now-unconfigured notification are generated.

Click the **Delete Notification** 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 selected notification type is now unconfigured on the **Invoice Setup and Notification** page.



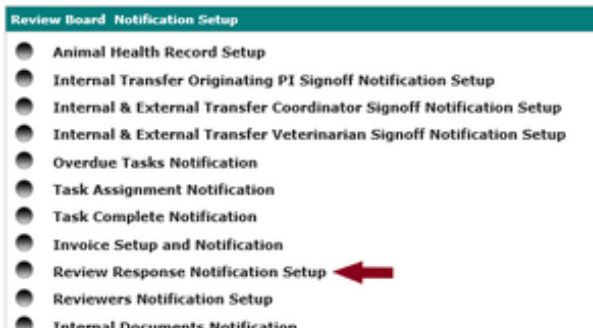
Notice that the **Edit** icon and **Delete Notification** button no longer appear, and an **Add Notification** button is provided for the now-unconfigured notification type.

Review Response Notifications

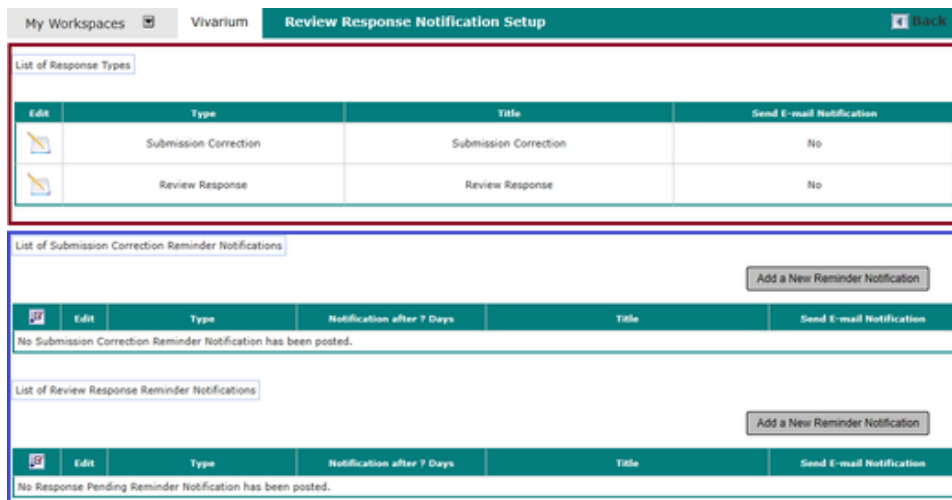
A review response notification is automatically sent to applicable study personnel when the review board returns a response or requests submission changes. Optionally, review response reminder notifications can also be configured to send when the board has not yet received a reply from the study.

Both types of notification are configured on the **Review Response Notification Setup** page.

To access the page, navigate to Animal Resource Center > Review Board Administration > **Review Response Notification Setup** link.



The **Review Response Notification Setup** page opens.



As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses response notifications sent following a board review. Notice that placeholders for these notifications are pre-populated, and while these notification types can be edited, they cannot be deleted. Notice also that no add buttons are provided for these notification types, only one version of each type can be configured.

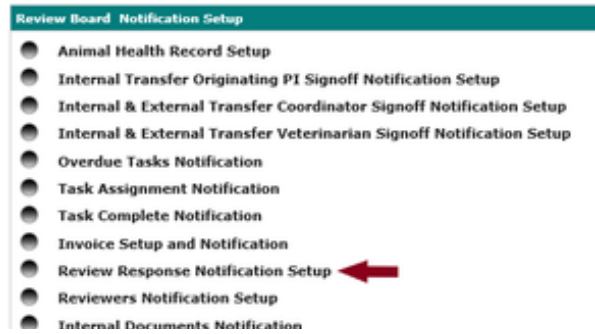
- the “Submission Correction” notification type is sent when the board has completed a submission review and requests one or more specific corrections followed by re-submission
- the “Review Response” notification type is sent when the board has completed a submission review and sends a response *other* than a request for corrections (e.g., request for additional forms, request for Conflict of Interest (COI) documentation, etc.)

The blue box encloses reminder notifications for each of the two response notification types. Unlike response notifications, multiple versions of reminder notifications can be configured.

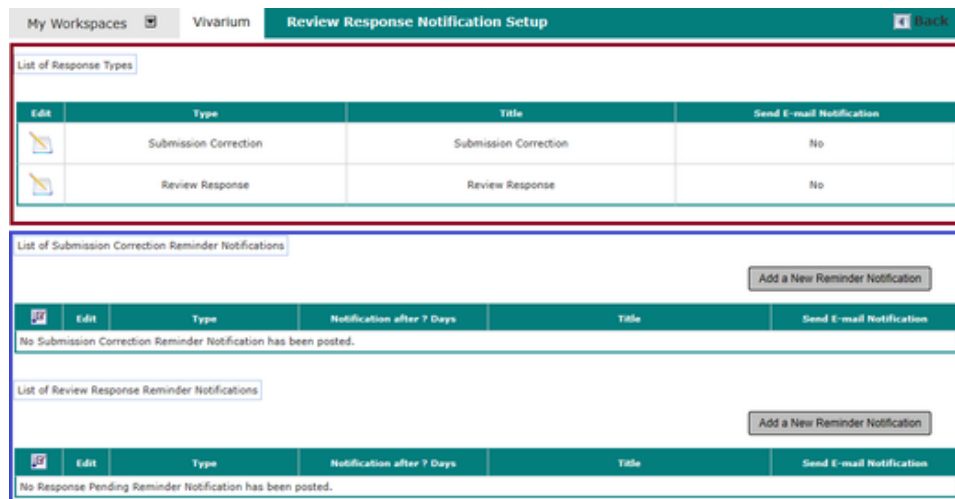
- Submission Correction Reminder notifications are automatically sent when the board has requested corrections and has not yet received a response from the study
- Review Response Reminder notifications are automatically sent when the board has sent a response *other* than a request for corrections and has not yet received a response from the study

Correction / Response Notification Setup

Navigate to Animal Resource Center > Review Board Administration > **Review Response Notification Setup** link.



The **Review Response Notification Setup** page opens.



As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses response notifications sent following a board review. Notice that placeholders for these notifications are pre-populated, and while these notification types can be edited, they cannot be deleted. Notice also that no add buttons are provided for these notification types, only one version of each type can be configured.

— the “Submission Correction” notification type is sent when the board has completed a submission review and requests one or more specific corrections followed by re-submission

— the “Review Response” notification type is sent when the board has completed a submission review and sends a response *other* than a request for corrections (e.g., request for additional forms, request for Conflict of Interest (COI) documentation, etc.)

The blue box encloses reminder notifications for each of the two response notification types.

Click the icon in the **Edit** column for the applicable review response notification.

My Workspaces ▾ Vivarium **Review Response Notification Setup** ⌕ Back

List of Response Types

Edit	Type	Title	Send E-mail Notification
	Submission Correction	Submission Correction	No
	Review Response	Review Response	No

List of Submission Correction Reminder Notifications Add a New Reminder Notification

Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Submission Correction Reminder Notification has been posted.				

List of Review Response Reminder Notifications Add a New Reminder Notification

Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Response Pending Reminder Notification has been posted.				

The notification is opened in a configuration panel.

My Workspaces ▾ Vivarium **Edit Submission Notice** ⌕ Back

Insert Merge Code Save Notification

Title:	<input type="text" value="Submission Correction"/>
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Send To:	<input checked="" type="checkbox"/> Principal Investigator <input checked="" type="checkbox"/> Study Contact
E-mail Content:	<div style="border: 1px solid #ccc; padding: 5px;"> <p>One or more errors have been found in your submission. Please see the specific correction request(s) in your workspace Task List, make the requested corrections and resubmit.</p> <p>{%rb_name%}</p> </div>

In this example a “Submission Correction” notification is being configured, but the configuration panel is the same for a Review Response notification.

Enter the desired subject line of the notification email in the **Title** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

The **Send To** field is used to specify whether the “Principal Investigator”, “Study Contact”(s), or both will receive the notification.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is configured on the notification setup page.

My Workspaces ▼ Vivarium Review Response Notification Setup Back

List of Response Types

Edit	Type	Title	Send E-mail Notification
	Submission Correction	Submission Correction	Yes
	Review Response	Review Response	No

List of Submission Correction Reminder Notifications

Add a New Reminder Notification

Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Submission Correction Reminder Notification has been posted.				

List of Review Response Reminder Notifications

Add a New Reminder Notification

Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Response Pending Reminder Notification has been posted.				

Correction / Response Reminder Notification Setup

A review response notification is automatically sent to applicable study personnel when the review board returns a response or requests submission changes. Optionally, review response reminder notifications can also be configured to send when the board has not yet received a reply from the study.

Both types of notification are configured on the **Review Response Notification Setup** page.

To access the page, navigate to Animal Resource Center > Review Board Administration > **Review Response Notification Setup** link.

Review Board Notification Setup

- Animal Health Record Setup
- Internal Transfer Originating PI Signoff Notification Setup
- Internal & External Transfer Coordinator Signoff Notification Setup
- Internal & External Transfer Veterinarian Signoff Notification Setup
- Overdue Tasks Notification
- Task Assignment Notification
- Task Complete Notification
- Invoice Setup and Notification
- Review Response Notification Setup**
- Reviewers Notification Setup
- Internal Documents Notification

The **Review Response Notification Setup** page opens.

My Workspaces ▼ Vivarium Review Response Notification Setup Back

List of Response Types

Edit	Type	Title	Send E-mail Notification
	Submission Correction	Submission Correction	No
	Review Response	Review Response	No

List of Submission Correction Reminder Notifications

Add a New Reminder Notification

Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Submission Correction Reminder Notification has been posted.				

List of Review Response Reminder Notifications

Add a New Reminder Notification

Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Response Pending Reminder Notification has been posted.				

As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses response notifications sent following a board review.

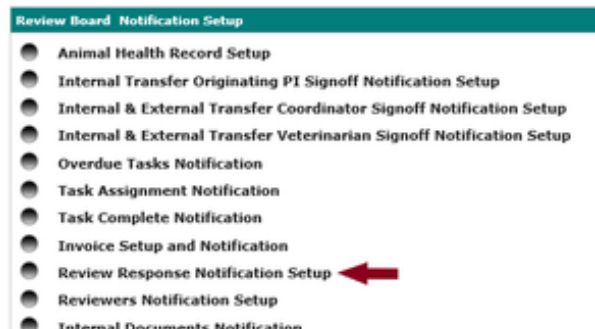
The blue box encloses reminder notifications for each of the two response notification types. Multiple versions of reminder notifications can be configured.

— Submission Correction Reminder notifications are automatically sent when the board has requested corrections and has not yet received a response from the study

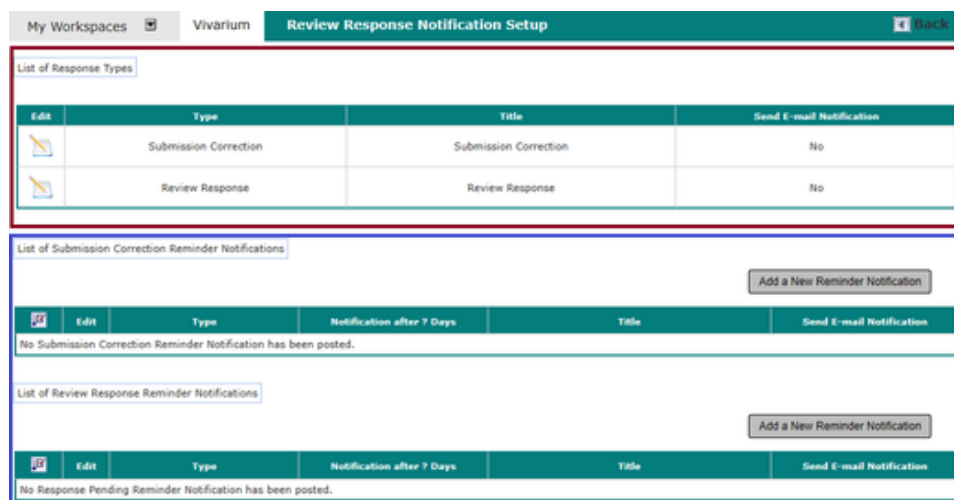
— Review Response Reminder notifications are automatically sent when the board has sent a response *other* than a request for corrections and has not yet received a response from the study

Configure Response Reminder Notification

Navigate to Animal Resource Center > Review Board Administration > **Review Response Notification Setup** link.



The **Review Response Notification Setup** page opens.



As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses response notifications sent following a board review.

The blue box encloses reminder notifications for each of the two response notification types. Multiple versions of reminder notifications can be configured.

— Submission Correction Reminder notifications are automatically sent when the board has requested corrections and has not yet received a response from the study

— Review Response Reminder notifications are automatically sent when the board has sent a response *other* than a request for corrections and has not yet received a response from the study

Click the **Add a New Reminder Notification** button for the applicable reminder notification.

My Workspaces Vivarium **Review Response Notification Setup** Back

List of Response Types

Edit	Type	Title	Send E-mail Notification
	Submission Correction	Submission Correction	Yes
	Review Response	Review Response	No

List of Submission Correction Reminder Notifications

Add a New Reminder Notification

Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Submission Correction Reminder Notification has been posted.				

List of Review Response Reminder Notifications

Add a New Reminder Notification

Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Response Pending Reminder Notification has been posted.				

The notification configuration panel opens. The same configuration form is used for both types of reminder notification.

My Workspaces Vivarium **Edit Submission Notice** Back

Insert Merge Code **Save Notification**

Type of Notification: Submission Correction Reminder Notification

Title:

Notification if within: in days.

Send E-Mail Notification: Yes No

Send To: Principal Investigator Study Contact

E-mail Content:

Submission corrections requested by the review board have not yet been received. Please see the specific correction request(s) in your workspace Task List, make the requested corrections and resubmit.

[%rb_name%]

In this example a “Submission Correction Reminder Notification” is being configured.

Enter the desired subject line of the notification email in the **Title** field.

Enter the number of days ahead of the due date the notification is to be sent in the **Notification if Within** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

The **Send To** field is used to specify whether the “Principal Investigator”, “Study Contact”(s), or both will receive the notification.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is configured on the notification setup page.

My Workspaces ▼ Vivarium **Review Response Notification Setup** Back

List of Response Types

Edit	Type	Title	Send E-mail Notification
	Submission Correction	Submission Correction	Yes
	Review Response	Review Response	No

List of Submission Correction Reminder Notifications

Add a New Reminder Notification Delete Reminder Notification(s)

<input type="checkbox"/>	Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
<input type="checkbox"/>		Submission Correction Reminder Notification	30 Days	Submission Corrections Required	Yes

List of Review Response Reminder Notifications

Add a New Reminder Notification

<input type="checkbox"/>	Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Response Pending Reminder Notification has been posted.					

Notice that the **Add a New Reminder Notification** button remains, indicating that additional reminder notifications of this type can be created. This is true for both reminder notification types.

Also notice that an icon is now available in the **Edit** column for the configured reminder, indicating that it can be revised, and a **Delete Reminder Notification** button is now available as well. This is true for both reminder notification types when configured.

Edit Response Reminder Notification

Navigate to Animal Resource Center > Review Board Administration > **Review Response Notification Setup** link.

Review Board Notification Setup

- Animal Health Record Setup
- Internal Transfer Originating PI Signoff Notification Setup
- Internal & External Transfer Coordinator Signoff Notification Setup
- Internal & External Transfer Veterinarian Signoff Notification Setup
- Overdue Tasks Notification
- Task Assignment Notification
- Task Complete Notification
- Invoice Setup and Notification
- Review Response Notification Setup ←
- Reviewers Notification Setup
- Internal Documents Notification

The **Review Response Notification Setup** page opens.

As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses response notifications sent following a board review.

The blue box encloses reminder notifications for each of the two response notification types. Multiple versions of reminder notifications can be configured.

- Submission Correction Reminder notifications are automatically sent when the board has requested corrections and has not yet received a response from the study
- Review Response Reminder notifications are automatically sent when the board has sent a response *other* than a request for corrections and has not yet received a response from the study

Click the icon in the **Edit** column for the applicable reminder notification.

The notification is opened in a configuration panel.

My Workspaces ▼ Vivarium ▶ **Edit Submission Notice** ⌕ [Back](#)

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

Type of Notification:	Submission Correction Reminder Notification
Title:	<input type="text" value="Submission Corrections Required"/>
Notification if within:	<input type="text" value="15"/> in days.
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Send To:	<input checked="" type="checkbox"/> Principal Investigator <input checked="" type="checkbox"/> Study Contact
E-mail Content:	<div style="border: 1px solid gray; padding: 5px;"> <p>Submission corrections requested by the review board have not yet been received. Please see the specific correction request(s) in your workspace Task List, make the requested corrections and resubmit.</p> <p>[%rb_name%]</p> </div>

In this example a “Submission Correction Reminder Notification” is being configured.

Make desired changes to the notification.

The **Title** field is used as the subject line in the notification e-mail.

The **Notification if Within** field specifies how many days ahead of the due date the notification is to be sent.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save changes and close the configuration panel. The notification is revised on the notification setup page.

My Workspaces ▼ Vivarium ▶ **Review Response Notification Setup** ⌕ [Back](#)

[List of Response Types](#)

Edit	Type	Title	Send E-mail Notification
	Submission Correction	Submission Correction	Yes
	Review Response	Review Response	No

[List of Submission Correction Reminder Notifications](#)

[Add a New Reminder Notification](#) [Delete Reminder Notification\(s\)](#)

	Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
<input type="checkbox"/>		Submission Correction Reminder Notification	15 Days	Submission Corrections Required	Yes

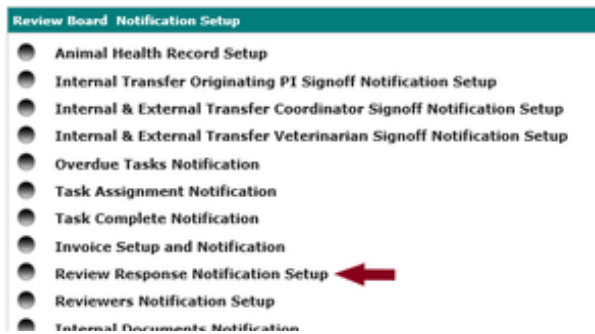
[List of Review Response Reminder Notifications](#)

[Add a New Reminder Notification](#)

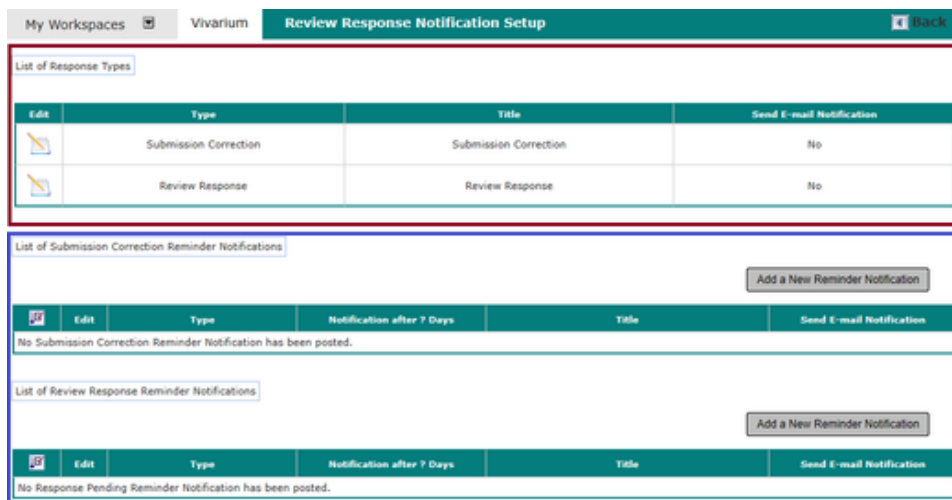
	Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Response Pending Reminder Notification has been posted.					

Delete Response Reminder Notification

Navigate to Animal Resource Center > Review Board Administration > **Review Response Notification Setup** link.



The **Review Response Notification Setup** page opens.



As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses response notifications sent following a board review.

The blue box encloses reminder notifications for each of the two response notification types. Multiple versions of reminder notifications can be configured.

— Submission Correction Reminder notifications are automatically sent when the board has requested corrections and has not yet received a response from the study

— Review Response Reminder notifications are automatically sent when the board has sent a response *other* than a request for corrections and has not yet received a response from the study

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

Select the checkbox in the far-left column for the applicable reminder notification, then click the **Delete Reminder Notification(s)** button.

My Workspaces ▼ Vivarium Review Response Notification Setup Back

List of Response Types

Edit	Type	Title	Send E-mail Notification
	Submission Correction	Submission Correction	Yes
	Review Response	Review Response	No

List of Submission Correction Reminder Notifications

Add a New Reminder Notification Delete Reminder Notification(s)

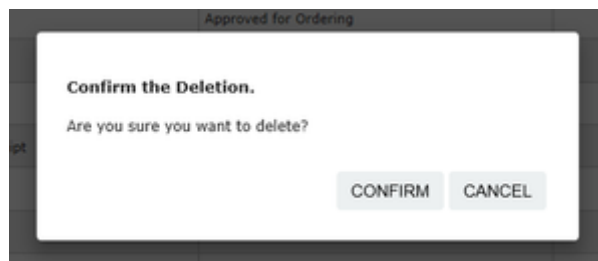
	Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
		Submission Correction Reminder Notification	15 Days	Submission Corrections Required	Yes

List of Review Response Reminder Notifications

Add a New Reminder Notification

	Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Response Pending Reminder Notification has been posted.					

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 selected notification type is now unconfigured on the notification setup page.

My Workspaces ▼ Vivarium Review Response Notification Setup Back

List of Response Types

Edit	Type	Title	Send E-mail Notification
	Submission Correction	Submission Correction	Yes
	Review Response	Review Response	No

List of Submission Correction Reminder Notifications

Add a New Reminder Notification

	Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Submission Correction Reminder Notification has been posted.					

List of Review Response Reminder Notifications

Add a New Reminder Notification

	Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Response Pending Reminder Notification has been posted.					

Notice that because no other reminder notifications of this type are configured, the **Delete Reminder Notification(s)** button no longer appears.

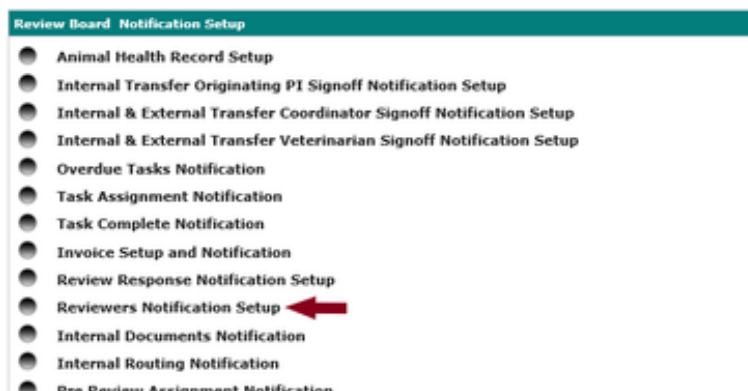
Reviewer Notifications

When configured, a reviewer notification is automatically sent to applicable study personnel when a new assignment is entered for a reviewer, a reviewer task is complete, or a reviewer is un-assigned from a task.

Reviewer reminder notifications can also be configured to automatically send when a reviewer task is assigned but has not yet been completed.

Both types of notification are configured on the **Reviewers Complete Notification** page.

To access the page, navigate to Animal Resource Center > Review Board Administration > **Reviewers Notification Setup** link.



The **Reviewers Complete Notification** page opens.

The screenshot shows the 'Reviewers Complete Notification' page in the Vivarium system. The page has a breadcrumb trail: My Workspaces > Vivarium > Reviewers Complete Notification > Back. It contains three tables for configuring notifications:

List of RB Reviewers Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification

List of Reviewer Assignment Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification

List of Reviewer Assignment Reminders

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification

As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.


The red box encloses notifications automatically sent to inform various types of reviewers of a task completion status, a new reviewer assignment, or that a reviewer assignment is removed. Notice that placeholders for these notifications are pre-populated, and while these notification types can be edited, they cannot be deleted. Notice also that no add buttons are provided for these notification types, only one version of each of these notifications can be configured at any time.

— the “Reviewers Complete” notification type is sent to the study Assigned Analyst when a review status is changed to complete

— the four “Reviewer Assignment” notification types (“Agenda”, “Expedited”, “Exempt”, “Process Administrative”) are sent to the study Assigned Reviewer(s) when a new task for the applicable review type is assigned

— the “Reviewer Unassignment” notification type is sent to the applicable study Assigned Reviewer when that reviewer’s task is un-assigned

The blue box encloses the “Reviewer Assignment Pending Reminder” notification type. When configured, this notification type is automatically sent when a study reviewer task is assigned but has not yet been completed.

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Agenda Reviewer Assignment	Yes	Delete Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification

As illustrated by the screenshot above:

— only one version of each reviewer complete/assignment/unassignment notification type can be configured, no add button is provided for notification types that are already configured

— until a notification type is configured, its **Title**, **Send E-Mail Notification**, and **When to Notify** (“Reviewer Assignment Pending Reminder” notification type only) fields are set to “Not Defined” and an add button is provided for the notification (red box)

— after a notification type is configured, its **Title**, **Send E-Mail Notification**, and **When to Notify** (“Reviewer Assignment Pending Reminder” notification type only) fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

The same configuration panel is used for all six (6) of the reviewer complete/assignment/unassignment notification types.

My Workspaces ▾ Vivarium **Edit Reviewer Assignment Notifications** [Back](#)

Insert Merge Code Save Notification

Type of Notification:	Agenda Reviewer Assignment Notification
Title:	<input type="text" value="Agenda Reviewer Assignment"/>
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>Be advised you have been assigned a reviewer task. Please see your workspace Task List for details of the assigned task.</p> </div>

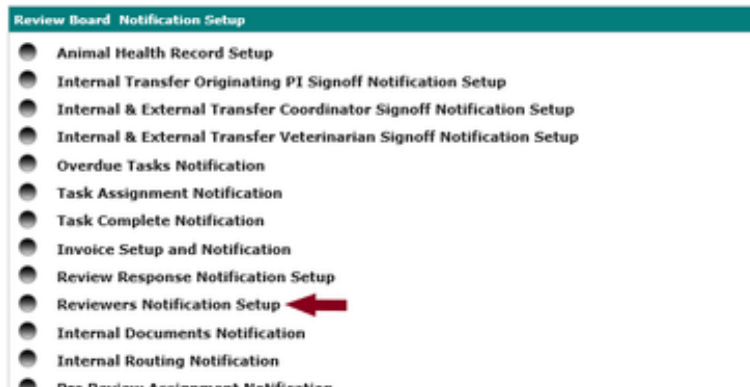
The **Title** field is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Configure Reviewer Notification

Navigate to Animal Resource Center > Review Board Administration > **Reviewers Notification Setup** link.



The **Reviewers Complete Notification** page opens.

My Workspaces ▾ Vivarium **Reviewers Complete Notification** [Back](#)

List of RB Reviewers Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification

List of Reviewer Assignment Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification


List of Reviewer Assignment Reminders

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification

As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses notifications automatically sent to inform various types of reviewers of a task completion status, a new reviewer assignment, or that a reviewer assignment is removed.

The blue box encloses the “Reviewer Assignment Pending Reminder” notification type.

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Agenda Reviewer Assignment	Yes	Delete Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification

As illustrated by the screenshot above:

- only one version of each reviewer complete/assignment/unassignment notification type can be configured, no add button is provided for notification types that are already configured
- until a notification type is configured, its **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and an add button is provided for the notification (red box)
- after a notification type is configured, its **Title** and **Send E-Mail Notification** fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

In the screenshot below, no notifications are configured. Click the applicable **Add Notification** button.

My Workspaces ▾ Vivarium Reviewers Complete Notification ⏪ Back

List of RB Reviewers Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification

List of Reviewer Assignment Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification

List of Reviewer Assignment Reminders

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification

A notification configuration panel opens. The same configuration panel is used for all six (6) of the reviewer notification types enclosed by the red box in the screenshot above.

My Workspaces ▾ Vivarium ⏪ Back

Insert Merge Code Save Notification

Type of Notification:	Agenda Reviewer Assignment Notification
Title:	<input type="text" value="Agenda Reviewer Assignment"/>
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>Be advised you have been assigned a reviewer task. Please see your workspace Task List for details of the assigned task.</p> </div>

In this example an “Agenda Reviewer Assignment Notification” is being configured.

Enter the desired subject line of the notification email in the **Title** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.




Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is configured on the notification setup page.

List of RB Reviewers Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification

List of Reviewer Assignment Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Agenda Reviewer Assignment	Yes	Delete Notification 
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification

List of Reviewer Assignment Reminders

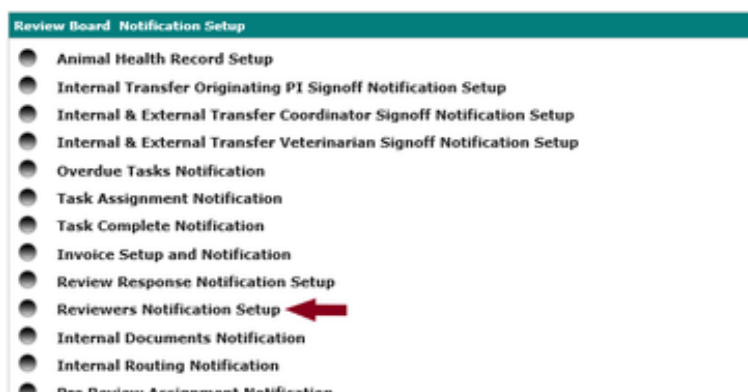
Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification

Notice that a **Delete Notification** button now appears in place of the **Add Notification** button, indicating that no additional versions of this notification type can be created. This is the case for all reviewer complete/assignment/unassignment notification types when configured.

Also notice that an icon is now available in the **Edit** column for the configured notification, indicating that it can be revised. This is the case for all reviewer complete/assignment/unassignment notification types when configured.

Edit Reviewer Notification

Navigate to Animal Resource Center > Review Board Administration > **Reviewers Notification Setup** link.



The **Reviewers Complete Notification** page opens.

My Workspaces Vivarium **Reviewers Complete Notification** Back

List of RB Reviewers Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

List of Reviewer Assignment Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Reviewer Unassignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

List of Reviewer Assignment Reminders

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses notifications automatically sent to inform various types of reviewers of a task completion status, a new reviewer assignment, or that a reviewer assignment is removed.

The blue box encloses the “Reviewer Assignment Pending Reminder” notification type.

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Agenda Reviewer Assignment	Yes	<input style="color: red;" type="button" value="Delete Notification"/>
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Reviewer Unassignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

As illustrated by the screenshot above:


— only one version of each reviewer complete/assignment/unassigned notification type can be configured, no add button is provided for notification types that are already configured

— until a notification type is configured, its **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and an add button is provided for the notification (red box)

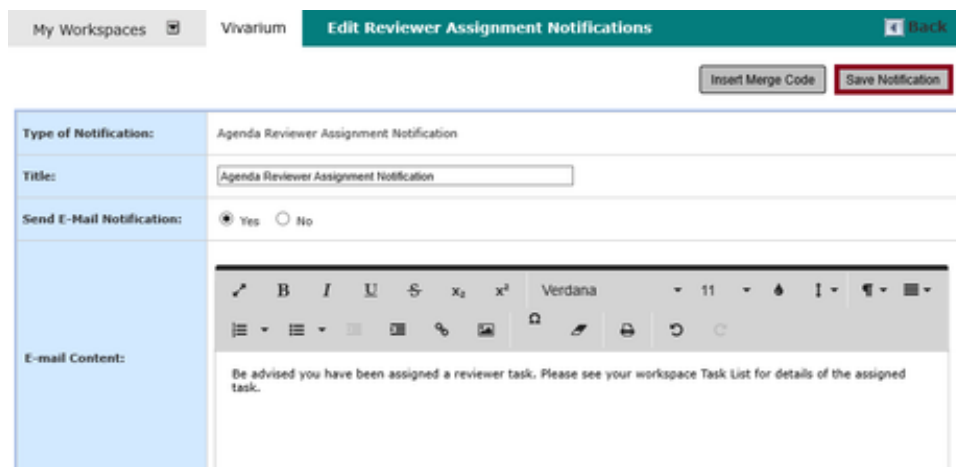
— after a notification type is configured, its **Title**, **Send E-Mail Notification**, and **When to Notify** (where applicable) fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)



Click the icon in the **Edit** column for the applicable notification type.

List of Reviewer Assignment Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Agenda Reviewer Assignment	Yes	Delete Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification

The notification is opened in a configuration panel. The same configuration panel is used for all reviewer complete/assignment/unassignment notifications.



My Workspaces  Vivarium **Edit Reviewer Assignment Notifications**  Back

Type of Notification: Agenda Reviewer Assignment Notification

Title:

Send E-Mail Notification: Yes No

E-mail Content:

Be advised you have been assigned a reviewer task. Please see your workspace Task List for details of the assigned task.

In this example an “Agenda Reviewer Assignment Notification” is being revised. Make desired changes to the notification.

The **Title** field is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.


Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is revised on the notification setup page.

List of RB Reviewers Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

List of Reviewer Assignment Notifications

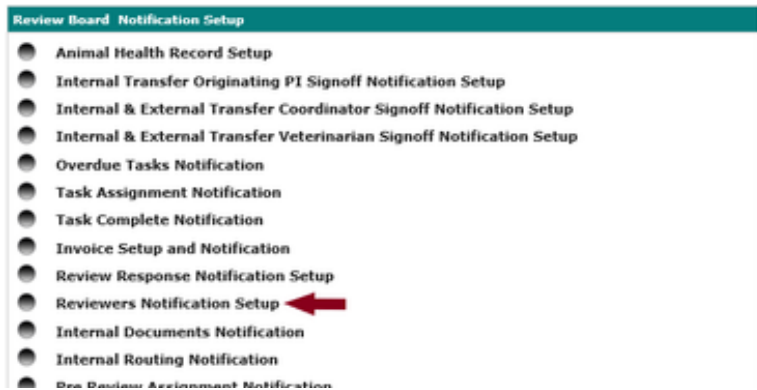
Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Agenda Reviewer Assignment Notification	Yes	<input type="button" value="Delete Notification"/>
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Reviewer Unassignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

List of Reviewer Assignment Reminders

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

Delete Reviewer Notification

Navigate to Animal Resource Center > Review Board Administration > **Reviewers Notification Setup** link.



The **Reviewers Complete Notification** page opens.

My Workspaces		Vivarium		Reviewers Complete Notification		Back	
List of RB Reviewers Complete Notifications							
Edit	Type	Title	Send E-mail Notification	Action			
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification			
List of Reviewer Assignment Notifications							
Edit	Type	Title	Send E-mail Notification	Action			
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification			
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification			
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification			
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification			
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification			
List of Reviewer Assignment Reminders							
Edit	Type	When to Notify	Title	Send E-mail Notification	Action		
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification		


As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses notifications automatically sent to inform various types of reviewers of a task completion status, a new reviewer assignment, or that a reviewer assignment is removed.

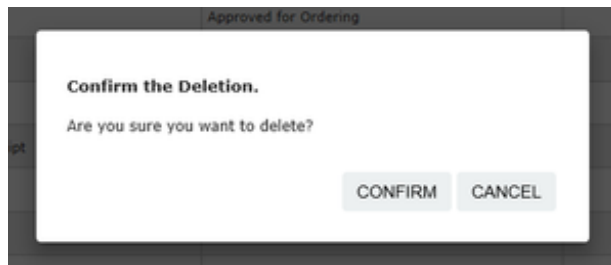
The blue box encloses the “Reviewer Assignment Pending Reminder” notification type.

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

Click the **Delete Notification** button for the applicable notification.

My Workspaces		Vivarium		Reviewers Complete Notification		Back	
List of RB Reviewers Complete Notifications							
Edit	Type	Title	Send E-mail Notification	Action			
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification			
List of Reviewer Assignment Notifications							
Edit	Type	Title	Send E-mail Notification	Action			
	Agenda Reviewer Assignment Notification	Agenda Reviewer Assignment Notification	Yes	Delete Notification			
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification			
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification			
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification			
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification			
List of Reviewer Assignment Reminders							
Edit	Type	When to Notify	Title	Send E-mail Notification	Action		
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification		

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 selected notification type is now unconfigured on the notification setup page.

My Workspaces Vivarium **Reviewers Complete Notification** Back

List of RB Reviewers Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

List of Reviewer Assignment Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Reviewer Unassignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

List of Reviewer Assignment Reminders

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

Notice that the **Edit** icon and **Delete Notification** button no longer appear, and an **Add Notification** button is provided for the now-unconfigured notification type.

Configure Reviewer Reminder

Navigate to Animal Resource Center > Review Board Administration > **Reviewers Notification Setup** link.

Review Board Notification Setup

- Animal Health Record Setup
- Internal Transfer Originating PI Signoff Notification Setup
- Internal & External Transfer Coordinator Signoff Notification Setup
- Internal & External Transfer Veterinarian Signoff Notification Setup
- Overdue Tasks Notification
- Task Assignment Notification
- Task Complete Notification
- Invoice Setup and Notification
- Review Response Notification Setup
- Reviewers Notification Setup
- Internal Documents Notification
- Internal Routing Notification
- Reviewer Assignment Notification

The **Reviewers Complete Notification** page opens.

My Workspaces Vivarium **Reviewers Complete Notification** Back

List of RB Reviewers Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

List of Reviewer Assignment Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Reviewer Unassignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

List of Reviewer Assignment Reminders

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses notifications automatically sent to inform various types of reviewers of a task completion status, a new reviewer assignment, or that a reviewer assignment is removed.

The blue box encloses the “Reviewer Assignment Pending Reminder” notification type.

My Workspaces Vivarium **Reviewers Complete Notification** Back

List of RB Reviewers Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

List of Reviewer Assignment Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Reviewer Unassignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

List of Reviewer Assignment Reminders

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

Click the “Reviewer Assignment Pending Reminder” **Add Notification** button. The notification configuration panel opens.

Type of Notification:	Reviewer Assignment Pending Reminder
Title:	<input type="text" value="Incomplete Reviewer Assignment"/>
Notify every ? Days	<input type="text" value="30"/> 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>Be advised you have an incomplete reviewer task. Please see your workspace Task List for details of the assigned task.</p></div>

Enter the desired subject line of the notification email in the **Title** field.

Enter how frequently, in number of days, the reminder is to be re-sent until the review task is complete in the **Notify every ? Days** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is configured on the notification setup page.

List of RB Reviewers Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

List of Reviewer Assignment Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Reviewer Unassignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

List of Reviewer Assignment Reminders

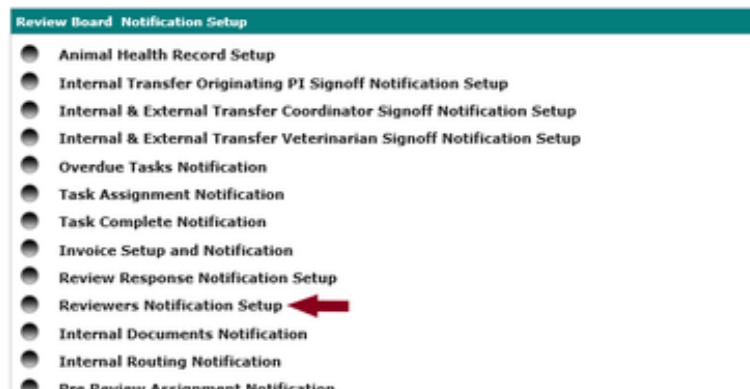
Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Notify every 30 Days	Incomplete Reviewer Assignment	Yes	<input type="button" value="Delete Notification"/>

Notice that a **Delete Notification** button now appears in place of the **Add Notification** button, indicating that no additional versions of this notification type can be created.

Also notice that an icon is now available in the **Edit** column for the configured notification, indicating that it can be revised.

Edit Reviewer Reminder

Navigate to Animal Resource Center > Review Board Administration > **Reviewers Notification Setup** link.



The **Reviewers Complete Notification** page opens.


My Workspaces		Vivarium		Reviewers Complete Notification		Back	
List of RB Reviewers Complete Notifications							
Edit	Type	Title	Send E-mail Notification	Action			
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification			
List of Reviewer Assignment Notifications							
Edit	Type	Title	Send E-mail Notification	Action			
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification			
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification			
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification			
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification			
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification			
List of Reviewer Assignment Reminders							
Edit	Type	When to Notify	Title	Send E-mail Notification	Action		
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification		

As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses notifications automatically sent to inform various types of reviewers of a task completion status, a new reviewer assignment, or that a reviewer assignment is removed.

The blue box encloses the “Reviewer Assignment Pending Reminder” notification type.

Click the **Edit** icon in the far-left column for the “Reviewer Assignment Pending Reminder” notification type (shown in screenshot below).

My Workspaces		Vivarium		Reviewers Complete Notification		Back	
List of RB Reviewers Complete Notifications							
Edit	Type	Title	Send E-mail Notification	Action			
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification			
List of Reviewer Assignment Notifications							
Edit	Type	Title	Send E-mail Notification	Action			
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification			
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification			
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification			
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification			
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification			
List of Reviewer Assignment Reminders							
Edit	Type	When to Notify	Title	Send E-mail Notification	Action		
	Reviewer Assignment Pending Reminder	Notify every 30 Days	Incomplete Reviewer Assignment	Yes	Delete Notification		

The notification is opened in a configuration panel.

My Workspaces ▼ Vivarium Edit Reviewer Assignment Reminders Back

Insert Merge Code Save Notification

Type of Notification:	Reviewer Assignment Pending Reminder
Title:	<input type="text" value="Incomplete Reviewer Assignment"/>
Notify every ? Days	<input type="text" value="15"/> in days.
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>Be advised you have an incomplete reviewer task. Please see your workspace Task List for details of the assigned task.</p> </div>

Make desired changes to the notification.

The **Title** field is used as the subject line in the notification e-mail.

The **Notify every ? Days** field specifies how frequently the reminder is to be re-sent until the task is complete.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is revised on the notification setup page.

My Workspaces ▼ Vivarium Reviewers Complete Notification Back

List of RB Reviewers Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification

List of Reviewer Assignment Notifications

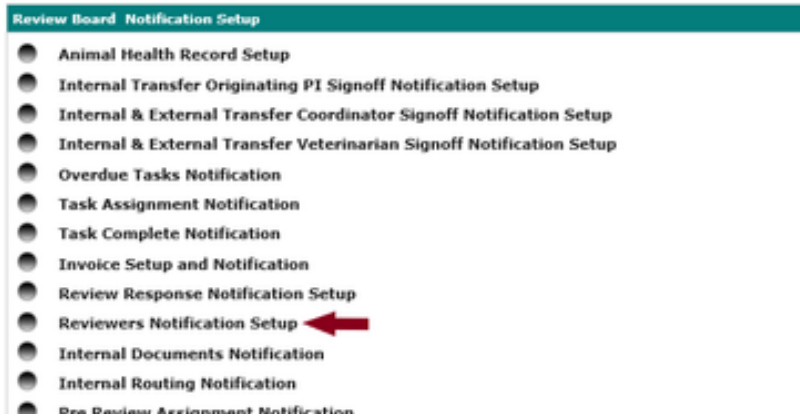
Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification

List of Reviewer Assignment Reminders

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Notify every 15 Days	Incomplete Reviewer Assignment	Yes	Delete Notification

Delete Reviewer Reminder

Navigate to Animal Resource Center > Review Board Administration > **Reviewers Notification Setup** link.



The **Reviewers Complete Notification** page opens.

My Workspaces ▾ Vivarium **Reviewers Complete Notification** [Back](#)

List of RB Reviewers Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	Add Notification

List of Reviewer Assignment Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	Add Notification
	Reviewer Unassignment Notification	Not Defined	Not Defined	Add Notification

List of Reviewer Assignment Reminders

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	Add Notification

As indicated by the colored boxes in the screenshot above, two general types of notifications can be configured on this page.

The red box encloses notifications automatically sent to inform various types of reviewers of a task completion status, a new reviewer assignment, or that a reviewer assignment is removed.

The blue box encloses the “Reviewer Assignment Pending Reminder” notification type.

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

Click the “Reviewer Assignment Pending Reminder” **Delete Notification** button (shown in screenshot below).

My Workspaces ▾ Vivarium Reviewers Complete Notification ⌵ Back


List of RB Reviewers Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

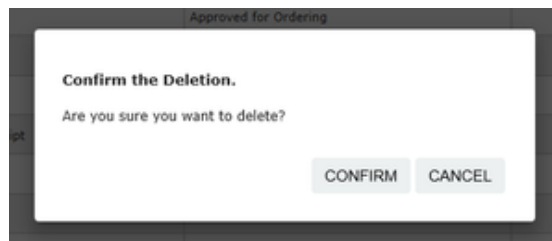
List of Reviewer Assignment Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Reviewer Unassignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

List of Reviewer Assignment Reminders

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Notify every 15 Days	Incomplete Reviewer Assignment	Yes	<input type="button" value="Delete Notification"/>

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 selected notification type is now unconfigured on the notification setup page.

My Workspaces ▾ Vivarium Reviewers Complete Notification ⌵ Back

List of RB Reviewers Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Reviewers Complete Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

List of Reviewer Assignment Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Agenda Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Expedited Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Exempt Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Process Administrative Reviewer Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Reviewer Unassignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

List of Reviewer Assignment Reminders

Edit	Type	When to Notify	Title	Send E-mail Notification	Action
	Reviewer Assignment Pending Reminder	Not Defined	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

Notice that the **Edit** icon and **Delete Notification** button no longer appear, and an **Add Notification** button is provided for the now-unconfigured notification type.

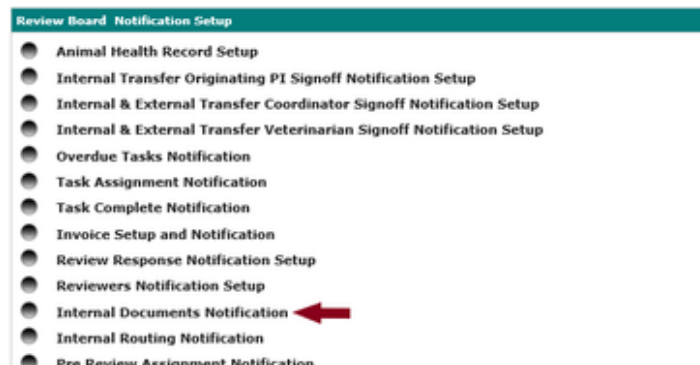
Internal Documents Notification

The review board can upload study documents internal to the review board and optionally, can send uploaded documents to specific iRIS™ users for review or response.

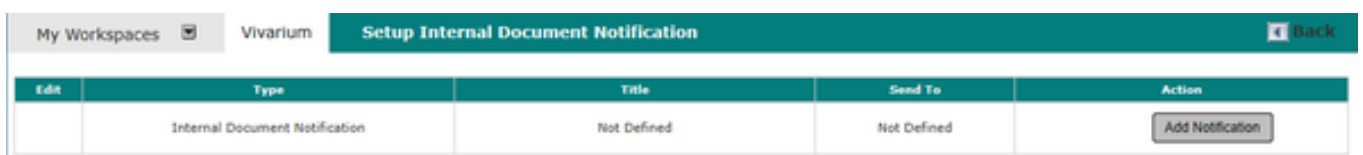
When configured, internal documents notifications are automatically sent to applicable study personnel to inform them they have been selected by the board to receive and/or review an internal board document.

This type of notification is configured on the **Setup Internal Document Notification** page.

To access the page, navigate to Animal Resource Center > Review Board Administration > **Internal Documents Notification Setup** link.



The **Setup Internal Document Notification** page opens.

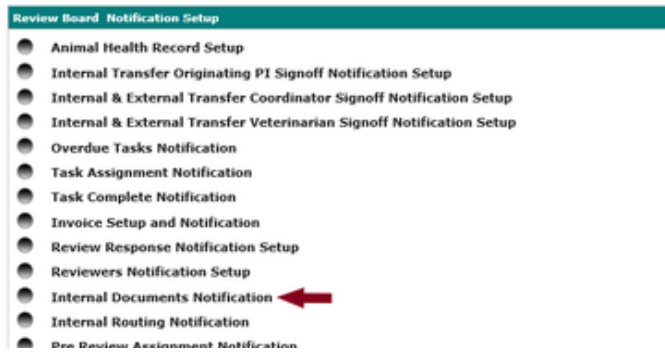


A screenshot of the 'Setup Internal Document Notification' page. The page has a header with 'My Workspaces' and 'Vivarium' on the left, and 'Setup Internal Document Notification' and a 'Back' button on the right. Below the header is a table with the following structure:

Edit	Type	Title	Send To	Action
	Internal Document Notification	Not Defined	Not Defined	<button>Add Notification</button>

Add Internal Documents Notification

Navigate to Animal Resource Center > Review Board Administration > **Internal Documents Notification Setup** link.



The **Setup Internal Document Notification** page opens.

My Workspaces ▾ Vivarium **Setup Internal Document Notification** ⏪ Back

Edit	Type	Title	Send To	Action
	Internal Document Notification	Not Defined	Not Defined	Add Notification

Click the **Add Notification** button. A configuration panel opens.

My Workspaces ▾ Vivarium **Setup Internal Document Notification** ⏪ Back Save Notification

Type of Notification:	Internal Document Notification
Title:	<input type="text" value="A document has been routed to you through IRIS for review/action. P"/>
Send To:	<input type="button" value="Add"/>

This notification type does not have a content field. Text entered in the **Title** field doubles as the notification text. Bear this in mind when entering **Title** field text. In the example above the full text entered in the **Title** field is, “A document has been routed to you through iRIS for review/action. Please log in for details.”

*Note that the **Title** field has an eighty (80) character limit, including spaces.*

If there are specific iRIS™ users who typically need to be included in distribution of internal board documents, they can be added to the distribution list from this page. Later, when an internal board document is uploaded, if the board member elects to distribute the uploaded document additional study personnel and specific iRIS™ users can be added to the distribution list without altering the distribution list specified here.

Click the **Add** button to select specific iRIS™ users to receive the notification. The **Search User Directory** page opens for user lookup and selection.

My Workspaces ▾ Vivarium Search User Directory Back

Directory Browse/Find: Last Name: (You may enter a partial name to search)
 First Name:
 by Department: Find

(search results display here)

As shown in the screenshot above, the user directory can be searched by full or partial **Last Name** or **First Name**, by **Department**, or by any combination of the three. Enter desired search criteria in the top section of the form and click the **Find** button. Search results display in the lower part of the page.

My Workspaces ▾ Vivarium Search User Directory Back Save Selected User(s)

Directory Browse/Find: Last Name: (You may enter a partial name to search)
 First Name:
 by Department: Find

Check for Multiple	Select User	Training	User Name	Department	Email
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Harper, Jill M, M.D., PhD		jharp@msc.edu

↑ ↑

Click the checkmark icon in the **Select User** column to add a single user to the notification distribution list.

The results list may include multiple names of iRIS™ users to be added to the distribution list. In that case select the checkbox(es) at far left for all applicable users and click the **Save Selected User(s)** button. The selected user(s) are added on the **Setup Internal Document Notification** page.

My Workspaces ▾ Vivarium Setup Internal Document Notification Back Save Notification


Type of Notification: Internal Document Notification

Title: A document has been routed to you through iRIS for review/action. P

Send To: Add Delete
 Harper, Jill M, M.D., PhD

If a user is added in error, select the checkbox to the left of that user's name and click the **Delete** button to remove the user from distribution.

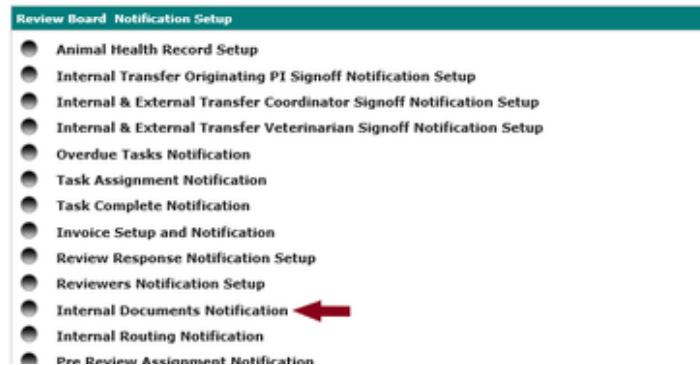
Click the **Save Notification** button. The notification is configured on the **Setup Internal Document Notification** page.

My Workspaces		Vivarium	Setup Internal Document Notification		Back
Edit	Type	Title	Send To	Action	
	Internal Document Notification	A document has been routed to you through iRIS for review/action. Please log in for details.	Harper, Jill M, M.D., PhD	Delete Notification	


Notice that the **Add Notification** button has been replaced with a **Delete Notification** button, an Edit icon has been added for the notification, and the full **Title** field text is displayed.

Edit Internal Documents Notification

Navigate to Animal Resource Center > Review Board Administration > **Internal Documents Notification Setup** link.



The **Setup Internal Document Notification** page opens.

My Workspaces		Vivarium	Setup Internal Document Notification		Back
Edit	Type	Title	Send To	Action	
	Internal Document Notification	A document has been routed to you through iRIS for review/action. Please log in for details.	Harper, Jill M, M.D., PhD	Delete Notification	

Click the icon in the **Edit** column. The notification is opened in a configuration panel.

My Workspaces		Vivarium	Setup Internal Document Notification		Back
Save Notification					
Type of Notification:	Internal Document Notification				
Title:	A document has been routed to you through iRIS for review/action. P				
Send To:	Add				

Make desired changes in the configuration panel.

Text entered in the **Title** field doubles as the notification text. Bear this in mind when revising **Title** field text. In the example above text entered in the **Title** field is revised to say, "A document has been routed to you through iRIS for

review or action. Please log in for details.”

Note that the **Title** field has an eighty (80) character limit, including spaces.

If there are specific iRIS™ users who typically need to be included in distribution of internal board documents, they can be added to the distribution list from this page. Later, when an internal board document is uploaded, if the board member elects to distribute the uploaded document additional study personnel and specific iRIS™ users can be added to the distribution list without altering the distribution list specified here.

Click the **Add** button to select specific iRIS™ users to receive the notification. The **Search User Directory** page opens for user lookup and selection.

My Workspaces ▾ Vivarium Search User Directory Back

Directory Browse/Find: Last Name: (You may enter a partial name to search)
First Name:
by Department: All Departments Find

(search results display here)

As shown in the screenshot above, the user directory can be searched by full or partial **Last Name** or **First Name**, by **Department**, or by any combination of the three. Enter desired search criteria in the top section of the form and click the **Find** button. Search results display in the lower part of the page.

My Workspaces ▾ Vivarium Search User Directory Back Save Selected User(s)

Directory Browse/Find: Last Name: Harpe (You may enter a partial name to search)
First Name:
by Department: All Departments Find

Check for Multiple	Select User	Training	User Name	Department	Email
<input type="checkbox"/>	<input checked="" type="checkbox"/>		Harpe, Jill M, M.D., PhD		jharpe@msc.edu

↑ ↑

Click the checkmark icon in the **Select User** column to add a single user to the notification distribution list.

The results list may include multiple names of iRIS™ users to be added to the distribution list. In that case select the checkbox(es) at far left for all applicable users and click the **Save Selected User(s)** button. The selected user(s) are added on the **Setup Internal Document Notification** page.

My Workspaces Vivarium **Setup Internal Document Notification** Back

Save Notification

Type of Notification:	Internal Document Notification
Title:	uted to you through iRIS for review or action. Please log in for deta -
Send To:	<input type="checkbox"/> Add <input checked="" type="checkbox"/> Delete <input checked="" type="checkbox"/> Harper, Jill M, M.D., PhD

If a user is added in error, select the checkbox to the left of that user's name and click the **Delete** button to remove the user from distribution.

Click the **Save Notification** button. The notification is revised on the **Setup Internal Document Notification** page.

My Workspaces Vivarium **Setup Internal Document Notification** Back

Edit	Type	Title	Send To	Action
	Internal Document Notification	A document has been routed to you through iRIS for review/action. Please log in for details.	Harper, Jill M, M.D., PhD	Delete Notification

Notice that on this page, the full **Title** field text is displayed.

Delete Internal Documents Notification

Navigate to Animal Resource Center > Review Board Administration > **Internal Documents Notification Setup** link.

- Review Board Notification Setup**
- Animal Health Record Setup
 - Internal Transfer Originating PI Signoff Notification Setup
 - Internal & External Transfer Coordinator Signoff Notification Setup
 - Internal & External Transfer Veterinarian Signoff Notification Setup
 - Overdue Tasks Notification
 - Task Assignment Notification
 - Task Complete Notification
 - Invoice Setup and Notification
 - Review Response Notification Setup
 - Reviewers Notification Setup
 - Internal Documents Notification
 - Internal Routing Notification
 - Pre Review Assignment Notification

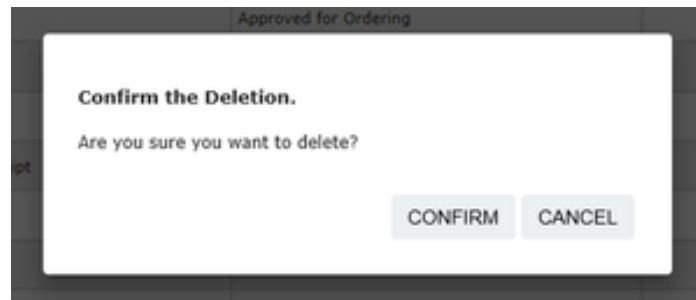
The **Setup Internal Document Notification** page opens.

My Workspaces Vivarium **Setup Internal Document Notification** Back

Edit	Type	Title	Send To	Action
	Internal Document Notification	A document has been routed to you through iRIS for review or action. Please log in for details.	Harper, Jill M, M.D., PhD	Delete Notification

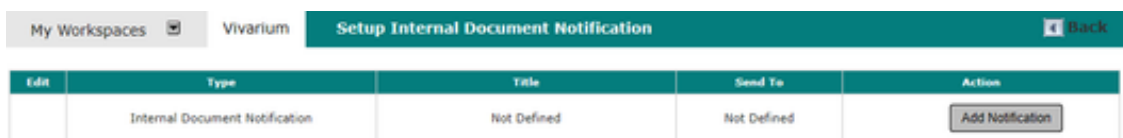
CAUTION: Deleting the configured internal document notification de-configures the notification and removes its future association from any internal board documents. Until the notification is reconfigured, no notification will be sent when internal board documents previously associated with the now-unconfigured notification are sent.

Click the **Delete Notification** 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 notification is now unconfigured on the **Setup Internal Document Notification** page.



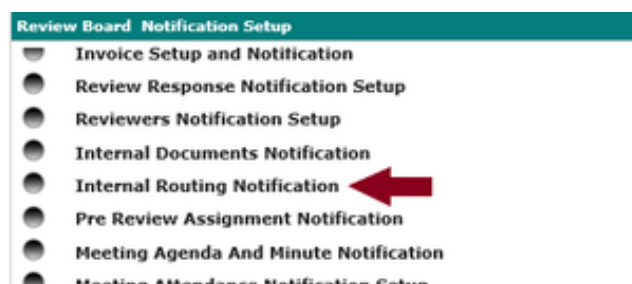
Edit	Type	Title	Send To	Action
	Internal Document Notification	Not Defined	Not Defined	<button>Add Notification</button>

Notice that the **Edit** icon and **Delete Notification** button no longer appear, and an **Add Notification** button is provided for the now-unconfigured notification.

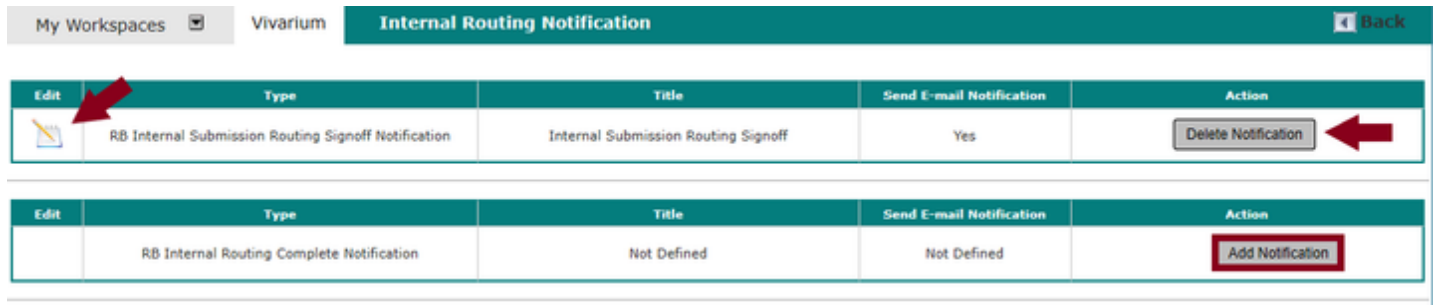
Internal Routing Notification


Internal submission routing signoff notifications can be configured in the iRIS™ system via a submission routing signoff notification setup page. When configured, these notifications are automatically sent to applicable study personnel when a transfer signoff task is initially assigned or completed. This type of notification is configured on the **Internal Routing Notification** page.

To access the page, navigate to Animal Resource Center > Review Board Administration > **Internal Routing Notification** link.



The **Internal Routing Notification** page opens.



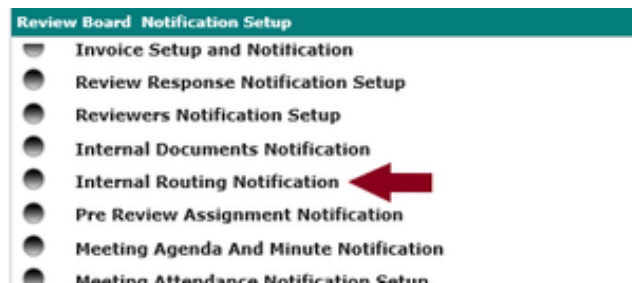
Edit	Type	Title	Send E-mail Notification	Action
	RB Internal Submission Routing Signoff Notification	Internal Submission Routing Signoff	Yes	Delete Notification
	RB Internal Routing Complete Notification	Not Defined	Not Defined	Add Notification

As shown in the screenshot above:

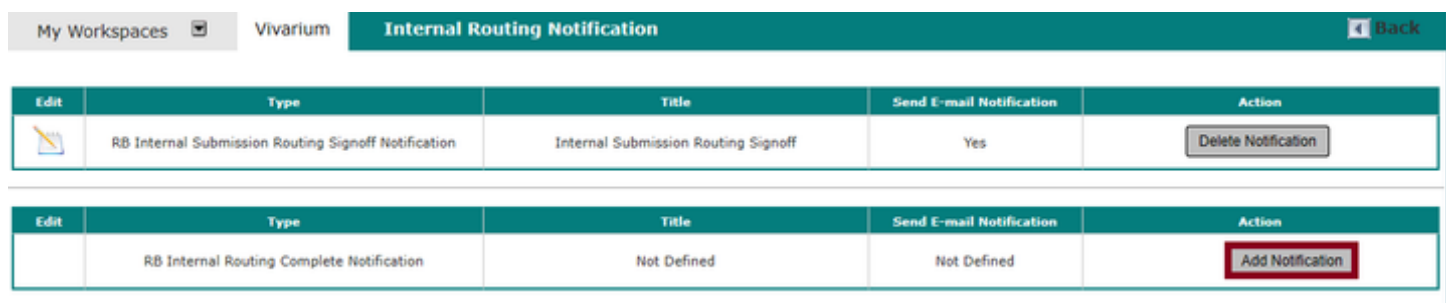
- only one version of each notification type can be configured, no add button is provided for notification types that are already configured
- until a notification type is configured its **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and an add button is provided for the notification (red box)
- after a notification type is configured its **Title** and **Send E-Mail Notification** fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)


Add Internal Routing Notification

Navigate to Animal Resource Center > Review Board Administration > **Internal Routing Notification** link.



The **Internal Routing Notification** page opens.



Edit	Type	Title	Send E-mail Notification	Action
	RB Internal Submission Routing Signoff Notification	Internal Submission Routing Signoff	Yes	Delete Notification
	RB Internal Routing Complete Notification	Not Defined	Not Defined	Add Notification

Click the applicable **Add Notification** button. In this example, the **RB Internal Routing Complete Notification** is being configured.

My Workspaces ▾ Vivarium **Edit RB Internal Routing Notification** Back

Insert Merge Code Save Notification

Type of Notification: RB Internal Submission Routing Complete Notification

Title: Internal Submission Routing Signoff Complete

Send E-Mail Notification: Yes No

E-mail Content:

Your study/protocol signoff task for [%rb_committee_name%] is complete.
[%rb_chair_name1%]

Enter the desired subject line of the notification email in the **Title** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the applicable recipient(s) whose signoff/review task is complete. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

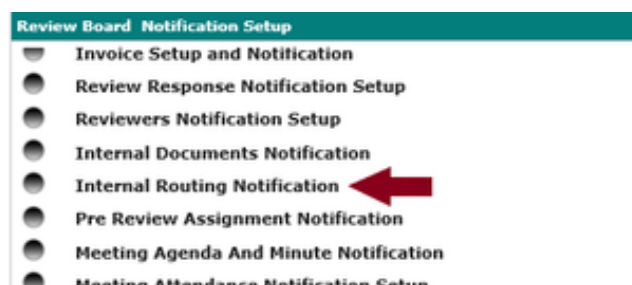
Click the **Save Notification** button to save the notification and close the configuration panel. The notification is configured on the notification setup page.

My Workspaces ▾ Vivarium **Internal Routing Notification** Back

Edit	Type	Title	Send E-mail Notification	Action
	RB Internal Submission Routing Signoff Notification	Internal Submission Routing Signoff	Yes	Delete Notification
	RB Internal Submission Routing Complete Notification	Internal Submission Routing Signoff Complete	Yes	Delete Notification

Edit Internal Routing Notification

Navigate to Animal Resource Center > Review Board Administration > **Internal Routing Notification** link.

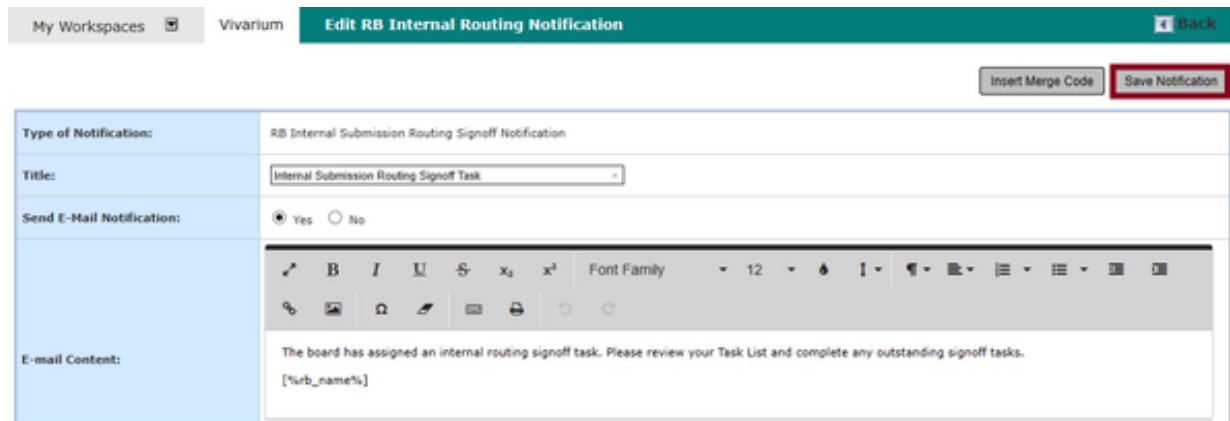


The **Internal Routing Notification** page opens.



Edit	Type	Title	Send E-mail Notification	Action
	RB Internal Submission Routing Signoff Notification	Internal Submission Routing Signoff	Yes	Delete Notification
	RB Internal Submission Routing Complete Notification	Internal Submission Routing Signoff Complete	Yes	Delete Notification

Click the icon in the **Edit** column for the applicable notification. In this example, the **RB Internal Routing Signoff Notification** is being revised.



My Workspaces ▾ Vivarium **Edit RB Internal Routing Notification** Back

Insert Merge Code Save Notification

Type of Notification:	RB Internal Submission Routing Signoff Notification
Title:	Internal Submission Routing Signoff Task
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
E-mail Content:	<p>The board has assigned an internal routing signoff task. Please review your Task List and complete any outstanding signoff tasks.</p> <p>[%rb_name%]</p>

Make desired changes to the subject line of the notification email in the **Title** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the applicable recipient(s) whose signoff/review task is complete. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

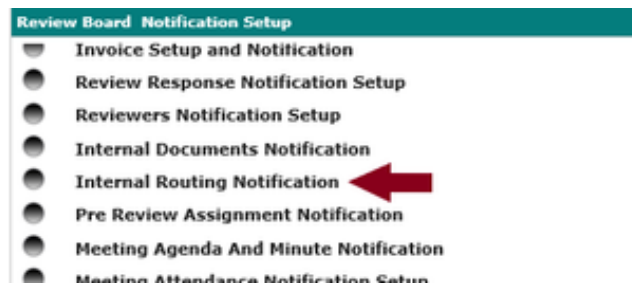
Make desired changes to boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is revised on the notification setup page.

Internal Routing Notification				
Edit	Type	Title	Send E-mail Notification	Action
	RB Internal Submission Routing Signoff Notification	Internal Submission Routing Signoff Task	Yes	Delete Notification
	RB Internal Submission Routing Complete Notification	Internal Submission Routing Signoff Complete	Yes	Delete Notification

Delete Internal Routing Notification

Navigate to Animal Resource Center > Review Board Administration > **Internal Routing Notification** link.



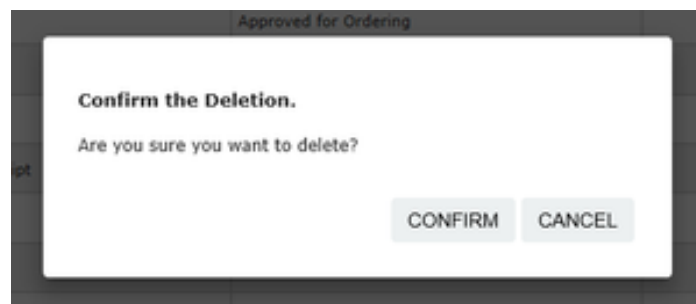
The **Internal Routing Notification** page opens.

Internal Routing Notification				
Edit	Type	Title	Send E-mail Notification	Action
	RB Internal Submission Routing Signoff Notification	Internal Submission Routing Signoff Task	Yes	Delete Notification
	RB Internal Submission Routing Complete Notification	Internal Submission Routing Signoff Complete	Yes	Delete Notification

CAUTION: Deleting the configured internal routing notification de-configures the notification. Until the notification is reconfigured, no notification will be sent when internal submission routing tasks are completed.

Click the applicable **Delete Notification** button. In this example the “RB Internal Submission Routing Complete Notification” is being deleted.

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 notification is now unconfigured on the **Setup Internal Routing Notification** page.

Internal Routing Notification Back				
Edit	Type	Title	Send E-mail Notification	Action
	RB Internal Submission Routing Signoff Notification	Internal Submission Routing Signoff Task	Yes	Delete Notification
	RB Internal Routing Complete Notification	Not Defined	Not Defined	Add Notification

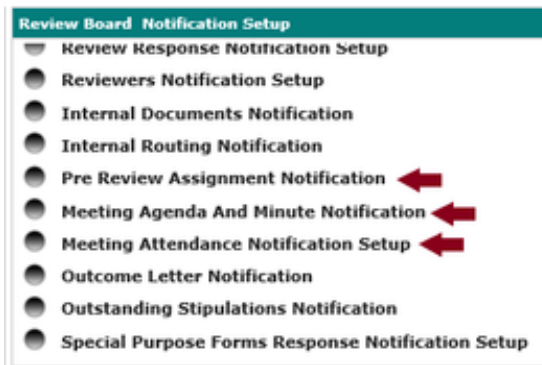
Notice that the **Edit** icon and **Delete Notification** button no longer appear, and an **Add Notification** button is provided for the now-unconfigured notification.

Meeting Notifications

The iRIS™ system allows for configuration of four (4) general categories of notification related to review board meetings:

- Pre Review notifications alert attendees who must complete a review task before the meeting, and are automatically sent to intended attendees when the meeting is scheduled
- Meeting Agenda notifications inform intended attendees a revised or finalized copy of the agenda is available, and are automatically sent when changes are saved to the agenda
- Meeting Minute notifications inform attendees a draft or finalized copy of meeting minutes is available, and are automatically sent when draft meeting minutes are saved
- Meeting Attendance notifications either request that intended attendees set their meeting availability (automatically sent to intended attendees when the meeting is scheduled) or inform the Coordinator that an intended attendee has changed their availability (automatically sent to Coordinator when the intended attendee takes that action)

The configuration pages for these notification types are accessed via Animal Resource Center > Review Board Administration > [applicable notification link].



Pre Review Notification

Pre Review notifications can be configured to automatically alert review board meeting attendees who must complete a prereview task prior to attending the meeting. Up to four (4) different prereview notification types are available for configuration (depending on the institution's review board settings), each for a different review type:

- Prereview Agenda Assignment Notification, for full board reviews
- Prereview Expedite Notification, for expedited reviews
- Prereview Exempt Notification, for exempt reviews
- Prereview Administrative Notification, for administrative reviews

All four (4) of these notification types are configured via the **Prereview Notification Setup** page. To access the page, navigate to Animal Resource Center > Review Board Administration > **Pre Review Assignment Notification** link.



The **Prereview Notification Setup** page opens.

Edit	Type	Title	Send E-mail Notification	Action
	Prereview Agenda Assignment Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Prereview Expedite Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Prereview Exempt Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>
	Prereview Administrative Notification	Not Defined	Not Defined	<input type="button" value="Add Notification"/>

The configuration form for all four (4) of these notification types is the same.

My Workspaces ▾ Vivarium **Edit Prereview Notification** [Back](#)

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

Type of Notification:	Prereview Agenda Assignment Notification
Title:	<input type="text" value="Prereview Agenda Assignment"/>
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Send To:	<input checked="" type="checkbox"/> Principal Investigator <input checked="" type="checkbox"/> Study Contact
E-mail Content:	<div style="border: 1px solid #ccc; padding: 5px;"><p>Be advised that you have been assigned a prereview agenda task for the [%rb_meeting_date%] review board meeting. Please review your workspace Task List and complete the assigned task before the meeting.</p><p>[%rb_name%]</p></div>

The **Title** field is used as the subject line in the notification e-mail.

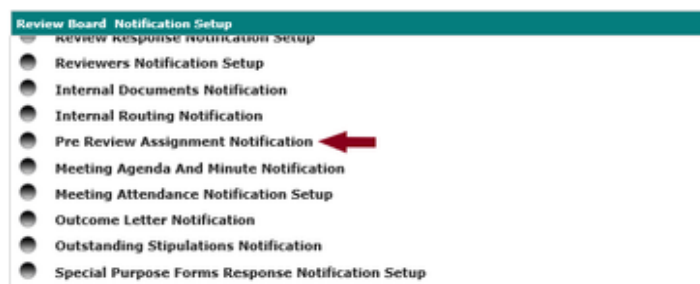
If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

The **Send To** field specifies whether the “Principal Investigator”, “Study Contact”(s), or both will receive the notification.

Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Add Pre Review Notification

Navigate to Animal Resource Center > Review Board Administration > **Pre Review Assignment Notification** link.



The **Prereview Notification Setup** page opens.

Edit	Type	Title	Send E-mail Notification	Action
	Prereview Agenda Assignment Notification	Not Defined	Not Defined	Add Notification
	Prereview Expedite Notification	Not Defined	Not Defined	Add Notification
	Prereview Exempt Notification	Not Defined	Not Defined	Add Notification
	Prereview Administrative Notification	Not Defined	Not Defined	Add Notification

Click the **Add Notification** button for the applicable notification type. The **Edit Prereview Notification** page opens for configuration of the notification. The same configuration form is used for all four (4) prereview notification types.

My Workspaces		Vivarium	Edit Prereview Notification	Back
				Insert Merge Code Save Notification
Type of Notification:	Prereview Agenda Assignment Notification			
Title:	<input type="text" value="Prereview Agenda Assignment"/>			
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No			
Send To:	<input checked="" type="checkbox"/> Principal Investigator <input checked="" type="checkbox"/> Study Contact			
E-mail Content:	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Be advised that you have been assigned a prereview agenda task for the [%rb_meeting_date%] review board meeting. Please review your workspace Task List and complete the assigned task before the meeting.</p> <p>[%rb_name%]</p> </div>			

Enter the desired subject line of the notification email in the **Title** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Select the checkbox for “Principal Investigator”, “Study Contact” or both to specify which study personnel should receive the notification in the **Send To** field.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the **Edit Prereview Notification** page. The notification is configured on the notification setup page.

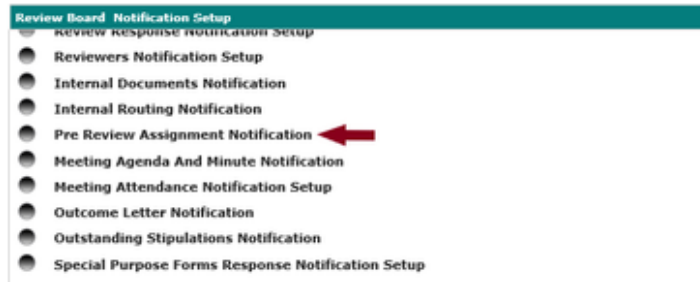
Edit	Type	Title	Send E-mail Notification	Action
	Prereview Agenda Assignment Notification	Prereview Agenda Assignment	Yes	Delete Notification
	Prereview Expedite Notification	Not Defined	Not Defined	Add Notification
	Prereview Exempt Notification	Not Defined	Not Defined	Add Notification
	Prereview Administrative Notification	Not Defined	Not Defined	Add Notification

Notice that a **Delete Notification** button now appears in place of the **Add Notification** button, indicating that no additional versions of this notification type can be created. This is the case for all prereview notifications when configured.

Also notice that an icon is now available in the **Edit** column for the configured notification, indicating that it can be revised.

Edit Pre Review Notification

Navigate to Animal Resource Center > Review Board Administration > **Pre Review Assignment Notification** link.



The **Prereview Notification Setup** page opens.

Edit	Type	Title	Send E-mail Notification	Action
	Prereview Agenda Assignment Notification	Prereview Agenda Assignment	Yes	Delete Notification
	Prereview Expedite Notification	Not Defined	Not Defined	Add Notification
	Prereview Exempt Notification	Not Defined	Not Defined	Add Notification
	Prereview Administrative Notification	Not Defined	Not Defined	Add Notification

Click the icon in the **Edit** column for the applicable notification type. The notification is opened in the **Edit Prereview Notification** page. The same configuration form is used for all four (4) prereview notification types.

Insert Merge Code **Save Notification**

Type of Notification:	Prereview Agenda Assignment Notification
Title:	<input type="text" value="Prereview Agenda Assignment Notification"/>
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Send To:	<input checked="" type="checkbox"/> Principal Investigator <input checked="" type="checkbox"/> Study Contact
E-mail Content:	<div style="border: 1px solid black; padding: 5px;"> <p>Be advised that you have been assigned a prereview agenda task for the [%rb_meeting_date%] review board meeting. Please review your workspace Task List and complete the assigned task before the meeting.</p> <p>[%rb_name%]</p> </div>

Make desired changes to the **Title** field, which is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Select the checkbox for “Principal Investigator”, “Study Contact” or both to specify which study personnel should receive the notification in the **Send To** field.

Make desired changes to the boilerplate text and Merge Codes entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the **Edit Prereview Notification** page. The notification is revised on the notification setup page.

Edit	Type	Title	Send E-mail Notification	Action
	Prereview Agenda Assignment Notification	Prereview Agenda Assignment Notification	Yes	Delete Notification
	Prereview Expedite Notification	Not Defined	Not Defined	Add Notification
	Prereview Exempt Notification	Not Defined	Not Defined	Add Notification
	Prereview Administrative Notification	Not Defined	Not Defined	Add Notification

Delete Pre Review Notification

Navigate to Animal Resource Center > Review Board Administration > **Pre Review Assignment Notification** link.

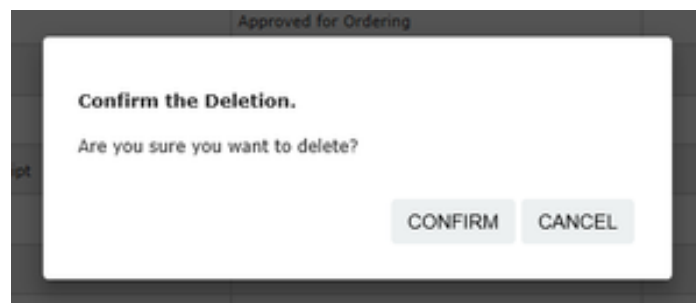


The **Prereview Notification Setup** page opens.

Edit	Type	Title	Send E-mail Notification	Action
	Prereview Agenda Assignment Notification	Prereview Agenda Assignment Notification	Yes	Delete Notification
	Prereview Expedite Notification	Not Defined	Not Defined	Add Notification
	Prereview Exempt Notification	Not Defined	Not Defined	Add Notification
	Prereview Administrative Notification	Not Defined	Not Defined	Add Notification

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

Click the **Delete Notification** button for the applicable notification type. 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 selected notification type is now unconfigured on the notification setup page.

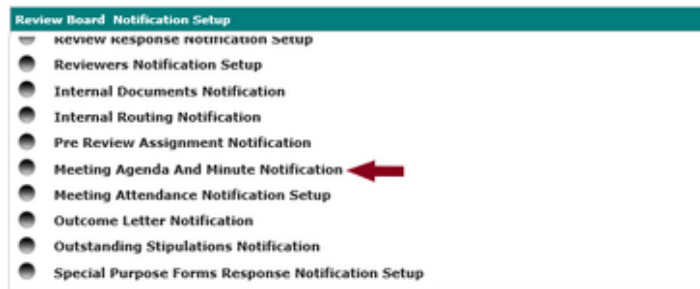
Edit	Type	Title	Send E-mail Notification	Action
	Prereview Agenda Assignment Notification	Not Defined	Not Defined	Add Notification
	Prereview Expedite Notification	Not Defined	Not Defined	Add Notification
	Prereview Exempt Notification	Not Defined	Not Defined	Add Notification
	Prereview Administrative Notification	Not Defined	Not Defined	Add Notification

Meeting Agenda And Minute Notifications

Four different types of meeting agenda and minute notifications can be configured to automatically alert attendees to changes in agenda and minutes status:

- Revised Meeting Agenda Notification, sent to all committee members when the agenda is revised
- Final Meeting Agenda Notification, sent to all committee members when the agenda is finalized
- Draft Meeting Minute Notification, sent to attendees marked “present” during the meeting when draft minutes are prepared
- Final Meeting Minute Notification, sent to attendees marked “present” during the meeting when finalized minutes are published

All four (4) of these notification types are configured via the **Meeting Agenda and Minute Notification Setup** page. To access the page, navigate to Animal Resource Center > Review Board Administration > **Meeting Agenda And Minute Notification Setup** link.



The **Meeting Agenda and Minute Notification Setup** page opens.

Edit	Type	Title	Send E-mail Notification	Action
	Final Meeting Agenda Notification	Not Defined	Not Defined	Add Notification
	Revised Meeting Agenda Notification	Not Defined	Not Defined	Add Notification
	Final Meeting Minute Notification	Not Defined	Not Defined	Add Notification
	Draft Meeting Minute Notification	Not Defined	Not Defined	Add Notification

The configuration form for all four (4) of these notification types is the same.

The screenshot shows a web interface for editing a notification. At the top, there are tabs for 'My Workspaces' and 'Vivarium', and a title bar 'Edit Meeting Agenda And Minute Notification' with a 'Back' button. Below the title bar are two buttons: 'Insert Merge Code' and 'Save Notification'. The main form area is divided into sections: 'Type of Notification:' with the value 'RB Final Meeting Agenda Notification'; 'Title:' with an empty text input field; 'Send E-Mail Notification:' with radio buttons for 'Yes' (selected) and 'No'; and 'E-mail Content:' with a rich text editor. The rich text editor has a toolbar with various icons for text formatting (bold, italic, underline, strikethrough, subscript, superscript), font selection (Font Family, size 12), and alignment options.

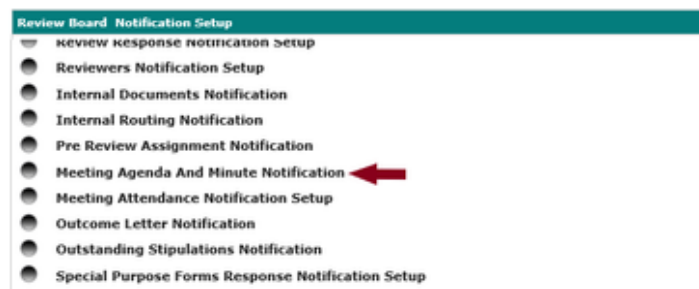
The **Title** field is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Add Meeting Agenda / Minute Notification

Navigate to Animal Resource Center > Review Board Administration > **Meeting Agenda And Minute Notification Setup** link.



The **Meeting Agenda and Minute Notification Setup** page opens.

Edit	Type	Title	Send E-mail Notification	Action
	Final Meeting Agenda Notification	Not Defined	Not Defined	Add Notification
	Revised Meeting Agenda Notification	Not Defined	Not Defined	Add Notification
	Final Meeting Minute Notification	Not Defined	Not Defined	Add Notification
	Draft Meeting Minute Notification	Not Defined	Not Defined	Add Notification

Click the applicable **Add Notification** button.

A configuration form is opened for creation of the notification. The configuration form for all four (4) of these notification types is the same.

My Workspaces		Vivarium	Meeting Agenda and Minute Notification Setup	Back
				Save Notification
Type of Notification:	RB Final Meeting Agenda Notification			
Title:	<input type="text" value="Final Meeting Agenda Published"/>			
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>The finalized agenda for the upcoming [%rb_meeting_date%] board meeting has been published.</p> </div>			

Enter the desired subject line of the notification email in the **Title** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

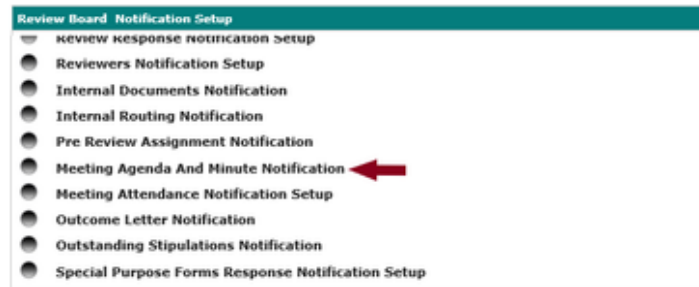
Click the **Save Notification** button. The notification is configured on the **Meeting Agenda and Minute Notification Setup** page.

Edit	Type	Title	Send E-mail Notification	Action
	Final Meeting Agenda Notification	Final Meeting Agenda Published	Yes	Delete Notification
	Revised Meeting Agenda Notification	Not Defined	Not Defined	Add Notification
	Final Meeting Minute Notification	Not Defined	Not Defined	Add Notification
	Draft Meeting Minute Notification	Not Defined	Not Defined	Add Notification

Notice that a **Delete Notification** button now appears in place of the **Add Notification** button, indicating that no additional versions of this notification type can be created. This is the case for all meeting agenda and minute notifications when configured.

Edit Meeting Agenda / Minute Notification

Navigate to Animal Resource Center > Review Board Administration > **Meeting Agenda And Minute Notification Setup** link.



The **Meeting Agenda and Minute Notification Setup** page opens.



The screenshot shows the 'Meeting Agenda and Minute Notification Setup' page. It features a table with columns for 'Edit', 'Type', 'Title', 'Send E-mail Notification', and 'Action'. The first row is highlighted with a red box around the 'Edit' icon.

Edit	Type	Title	Send E-mail Notification	Action
	Final Meeting Agenda Notification	Final Meeting Agenda Published	Yes	Delete Notification
	Revised Meeting Agenda Notification	Not Defined	Not Defined	Add Notification
	Final Meeting Minute Notification	Not Defined	Not Defined	Add Notification
	Draft Meeting Minute Notification	Not Defined	Not Defined	Add Notification

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

The notification is opened in a configuration form for editing. The configuration form for all four (4) of these notification types is the same.

My Workspaces Vivarium **Edit Meeting Agenda And Minute Notification** Back

Insert Merge Code **Save Notification**

Type of Notification:	RB Final Meeting Agenda Notification
Title:	Final Meeting Agenda 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;"> <p>The finalized agenda for the upcoming [%rb_meeting_date%] board meeting has been published.</p> </div>

Make desired changes to the **Title** field, which is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Make desired changes to the boilerplate text and Merge Codes entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save changes and close the configuration form. The notification is revised on the **Meeting Agenda and Minute Notification Setup** page.

My Workspaces Vivarium **Meeting Agenda and Minute Notification Setup** Back

Edit	Type	Title	Send E-mail Notification	Action
	Final Meeting Agenda Notification	Final Meeting Agenda Notification	Yes	Delete Notification
	Revised Meeting Agenda Notification	Not Defined	Not Defined	Add Notification
	Final Meeting Minute Notification	Not Defined	Not Defined	Add Notification
	Draft Meeting Minute Notification	Not Defined	Not Defined	Add Notification

Delete Meeting Agenda / Minute Notification

Navigate to Animal Resource Center > Review Board Administration > **Meeting Agenda And Minute Notification Setup** link.

- Review Board Notification Setup**
- Review Response Notification Setup
 - Reviewers Notification Setup
 - Internal Documents Notification
 - Internal Routing Notification
 - Pre Review Assignment Notification
 - Meeting Agenda And Minute Notification**
 - Meeting Attendance Notification Setup
 - Outcome Letter Notification
 - Outstanding Stipulations Notification
 - Special Purpose Forms Response Notification Setup

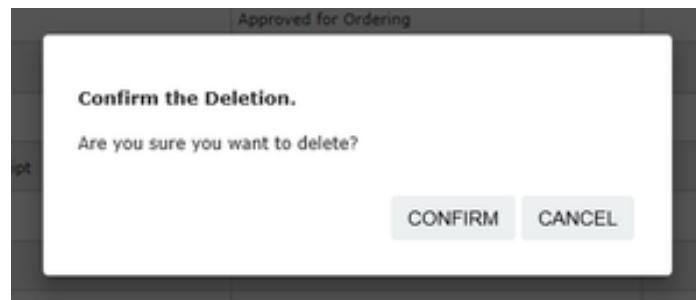
The **Meeting Agenda and Minute Notification Setup** page opens.



Edit	Type	Title	Send E-mail Notification	Action
	Final Meeting Agenda Notification	Final Meeting Agenda Notification	Yes	Delete Notification
	Revised Meeting Agenda Notification	Not Defined	Not Defined	Add Notification
	Final Meeting Minute Notification	Not Defined	Not Defined	Add Notification
	Draft Meeting Minute Notification	Not Defined	Not Defined	Add Notification

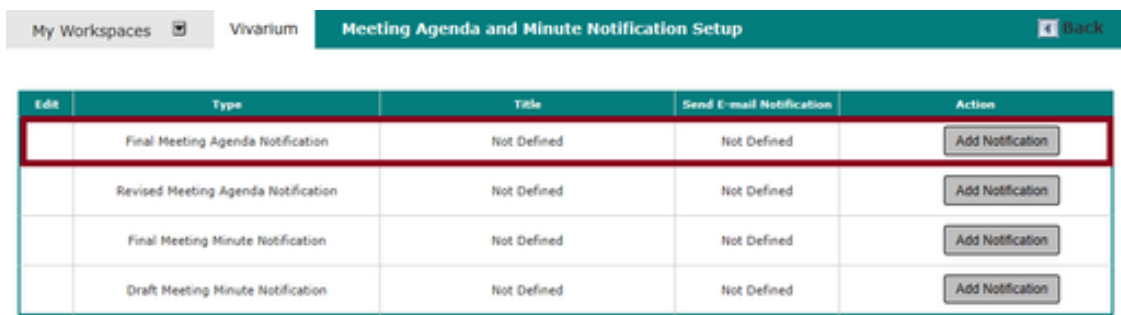
CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

Click the **Delete Notification** button for the applicable notification. 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 selected notification type is now unconfigured on the notification setup page.



Edit	Type	Title	Send E-mail Notification	Action
	Final Meeting Agenda Notification	Not Defined	Not Defined	Add Notification
	Revised Meeting Agenda Notification	Not Defined	Not Defined	Add Notification
	Final Meeting Minute Notification	Not Defined	Not Defined	Add Notification
	Draft Meeting Minute Notification	Not Defined	Not Defined	Add Notification

Notice that the **Edit** icon and **Delete Notification** button no longer appear, and an **Add Notification** button is provided for the now-unconfigured notification type.

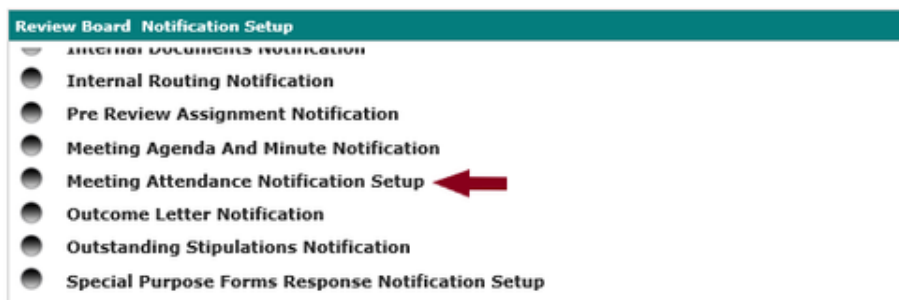
Meeting Attendance Notification Setup

Two types of meeting attendance notification can be configured.

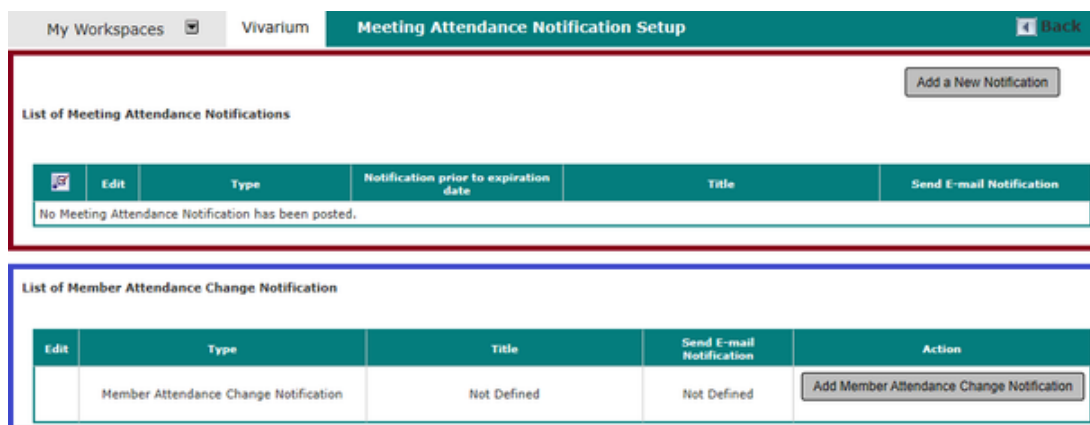
— the Meeting Attendance Notification is automatically sent to intended meeting attendees when the meeting is scheduled, and requests that the attendee set their availability for the meeting

— the Member Attendance Change Notification is automatically sent to the Coordinator when any intended attendee changes their meeting availability status

Both notification types are configured via the **Meeting Attendance Notification Setup** page. To access the page, navigate to Animal Resource Center > Review Board Administration > **Meeting Attendance Notification Setup** link.



The **Meeting Attendance Notification Setup** page opens.



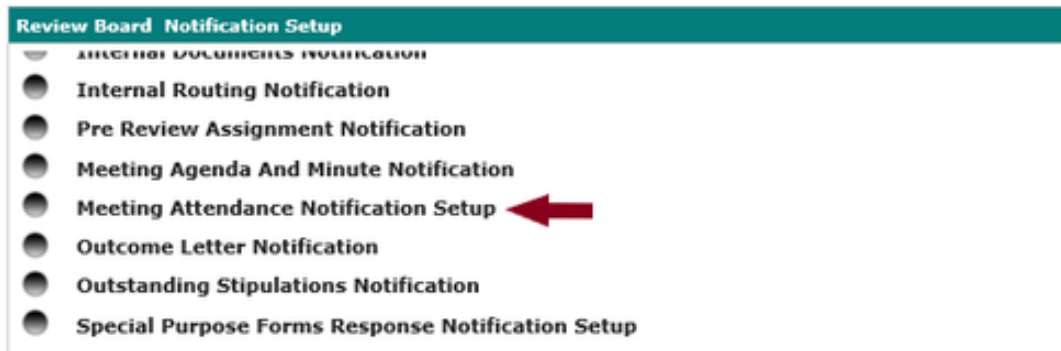
As highlighted by the red box in the screenshot above, the Meeting Attendance Notification list appears in the upper part of the page. When no notifications of this type are configured the list is empty and an **Add a New Notification** button is provided.

As shown in the screenshot below, when a notification of this type is configured it is shown in the list. An **Edit** icon and **Delete Notification(s)** button are added, and the **Add a New Notification** button remains for configuration of additional notifications of this type.

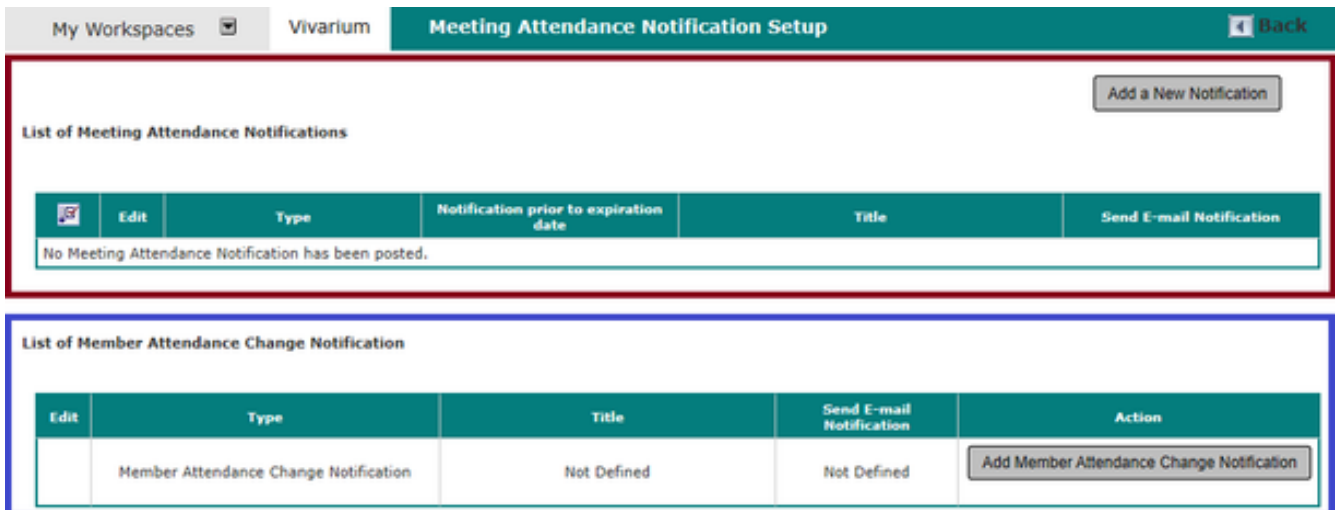


Add Meeting Attendance Notification

Navigate to Animal Resource Center > Review Board Administration > **Meeting Attendance Notification Setup** link.



The **Meeting Attendance Notification Setup** page opens.



As highlighted by the red box in the screenshot above, the Meeting Attendance notification list appears in the upper part of the page. When no notifications of this type are configured the list is empty and an **Add a New Notification** button is provided.

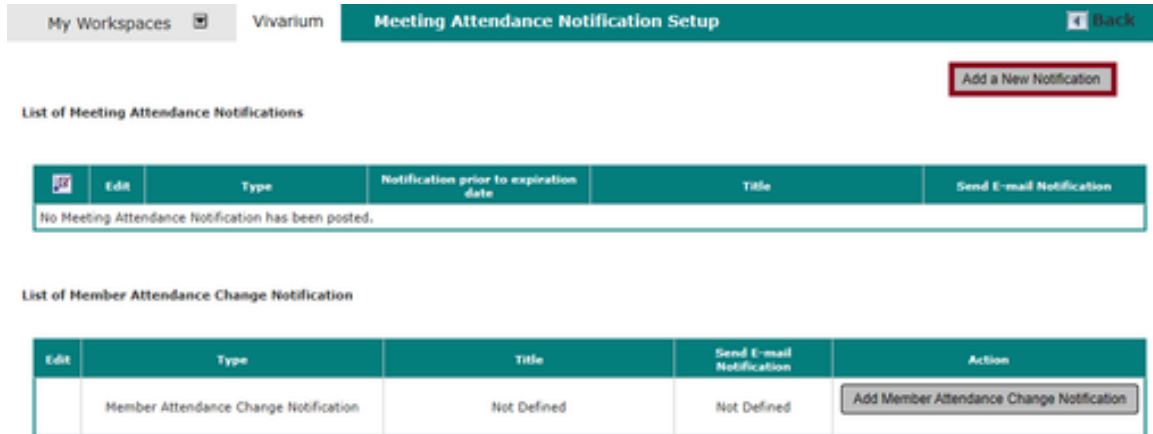
As shown in the screenshot below, when a notification of this type is configured it is shown in the list. An **Edit** icon and **Delete Notification(s)** button are added, and the **Add a New Notification** button remains for configuration of additional notifications of this type.



List of Meeting Attendance Notifications

Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
	Meeting Attendance Notification	30 Days	Member Attendance Notification	Yes

Click the **Add a New Notification** button.



My Workspaces Vivarium Meeting Attendance Notification Setup Back

Add a New Notification

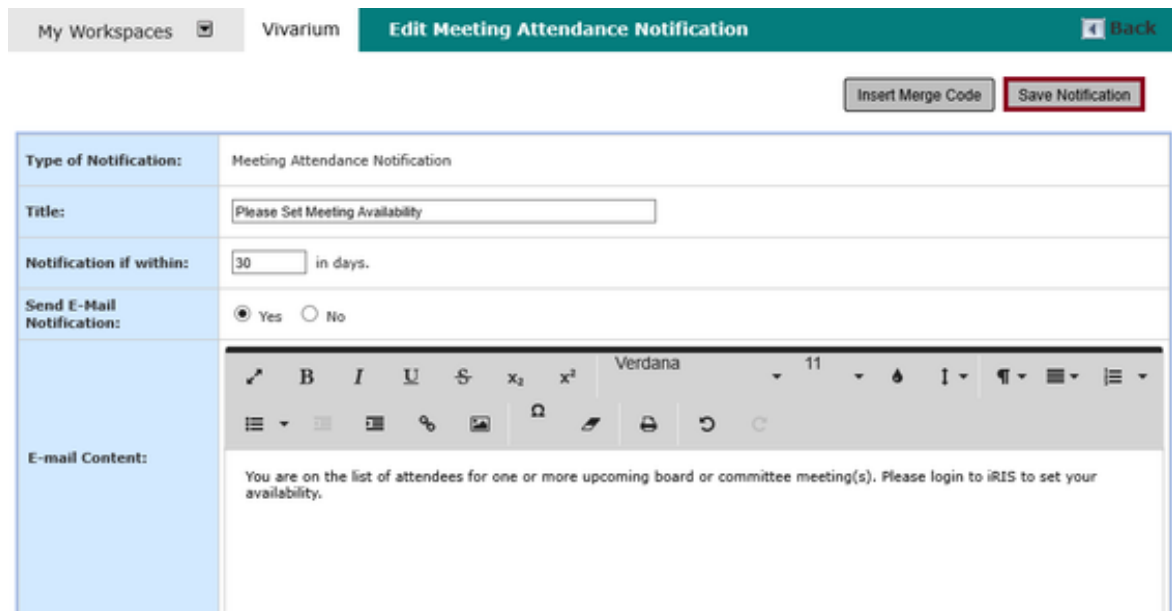
List of Meeting Attendance Notifications

Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
No Meeting Attendance Notification has been posted.				

List of Member Attendance Change Notification

Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Not Defined	Not Defined	Add Member Attendance Change Notification

The **Edit Meeting Attendance Notification** page opens.



My Workspaces Vivarium Edit Meeting Attendance Notification Back

Insert Merge Code Save Notification

Type of Notification: Meeting Attendance Notification

Title: Please Set Meeting Availability

Notification if within: 30 in days.

Send E-Mail Notification: Yes No

E-mail Content:

You are on the list of attendees for one or more upcoming board or committee meeting(s). Please login to IRIS to set your availability.

Enter the desired subject line of the notification email in the **Title** field.

Enter the number of days ahead of the meeting date the notification is to be sent in the **Notification if Within** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the page. The notification is added to the list in the upper portion of the **Meeting Attendance Setup** page.

My Workspaces ▼ Vivarium **Meeting Attendance Notification Setup** ⌂ Back

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

List of Meeting Attendance Notifications

	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
		Meeting Attendance Notification	30 Days	Please Set Meeting Availability	Yes

List of Member Attendance Change Notification

Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Not Defined	Not Defined	Add Member Attendance Change Notification

Notice that an **Edit** icon is provided for the notification, and a **Delete Notification** button is added for the list.

Edit Meeting Attendance Notification

Navigate to Animal Resource Center > Review Board Administration > **Meeting Attendance Notification Setup** link.

Review Board Notification Setup

- ARCHIVAL DOCUMENTS NOTIFICATION
- Internal Routing Notification
- Pre Review Assignment Notification
- Meeting Agenda And Minute Notification
- Meeting Attendance Notification Setup
- Outcome Letter Notification
- Outstanding Stipulations Notification
- Special Purpose Forms Response Notification Setup

The **Meeting Attendance Notification Setup** page opens.

My Workspaces ▼ Vivarium **Meeting Attendance Notification Setup** ⌂ Back

[Add a New Notification](#)

List of Meeting Attendance Notifications

	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
No Meeting Attendance Notification has been posted.					

List of Member Attendance Change Notification

Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Not Defined	Not Defined	Add Member Attendance Change Notification



As highlighted by the red box in the screenshot above, the Meeting Attendance notification list appears in the upper part of the page. When no notifications of this type are configured the list is empty and an **Add a New Notification** button is provided.

As shown in the screenshot below, when a notification of this type is configured it is shown in the list. An **Edit** icon and **Delete Notification(s)** button are added, and the **Add a New Notification** button remains for configuration of additional notifications of this type.




List of Meeting Attendance Notifications

	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
		Meeting Attendance Notification	30 Days	Member Attendance Notification	Yes

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

My Workspaces  Vivarium **Meeting Attendance Notification Setup**  Back



List of Meeting Attendance Notifications


	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
		Meeting Attendance Notification	30 Days	Please Set Meeting Availability	Yes

List of Member Attendance Change Notification

Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Not Defined	Not Defined	<input type="button" value="Add Member Attendance Change Notification"/>

The notification is opened for editing in the **Edit Meeting Attendance Notification** page.

My Workspaces  Vivarium **Edit Meeting Attendance Notification**  Back

Type of Notification:	Meeting Attendance Notification
Title:	<input type="text" value="Please Set Meeting Availability"/>
Notification if within:	<input type="text" value="15"/> 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>You are on the list of attendees for one or more upcoming board or committee meeting(s). Please login to iRIS to set your availability.</p> </div>

Make desired changes to the **Title** field, which is used as the subject line in the notification e-mail.

The **Notification if Within** field specifies how many days ahead of the meeting date the notification is to be sent.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Make desired changes to the boilerplate text and Merge Codes entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the page. The notification is revised in the upper portion of the **Meeting Attendance Setup** page.

My Workspaces ▼ Vivarium **Meeting Attendance Notification Setup** 1 Back

List of Meeting Attendance Notifications

	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Meeting Attendance Notification	15 Days	Please Set Meeting Availability	Yes

List of Member Attendance Change Notification

Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Not Defined	Not Defined	<input type="button" value="Add Member Attendance Change Notification"/>

Delete Meeting Attendance Notification

Navigate to Animal Resource Center > Review Board Administration > **Meeting Attendance Notification Setup** link.

Review Board Notification Setup

- INTERNAL DOCUMENTS NOTIFICATION
- Internal Routing Notification
- Pre Review Assignment Notification
- Meeting Agenda And Minute Notification
- Meeting Attendance Notification Setup
- Outcome Letter Notification
- Outstanding Stipulations Notification
- Special Purpose Forms Response Notification Setup

The **Meeting Attendance Notification Setup** page opens.

My Workspaces Vivarium Meeting Attendance Notification Setup Back

[Add a New Notification](#)

List of Meeting Attendance Notifications

	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
No Meeting Attendance Notification has been posted.					

List of Member Attendance Change Notification

Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Not Defined	Not Defined	Add Member Attendance Change Notification

As highlighted by the red box in the screenshot above, the Meeting Attendance notification list appears in the upper part of the page. When no notifications of this type are configured the list is empty and an **Add a New Notification** button is provided.

As shown in the screenshot below, when a notification of this type is configured it is shown in the list. An **Edit** icon and **Delete Notification(s)** button are added, and the **Add a New Notification** button remains for configuration of additional notifications of this type.

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

List of Meeting Attendance Notifications

	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Meeting Attendance Notification	30 Days	Member Attendance Notification	Yes

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

Select the checkbox in the far-left column for the applicable notification and click the **Delete Notification** button.

My Workspaces Vivarium Meeting Attendance Notification Setup Back

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

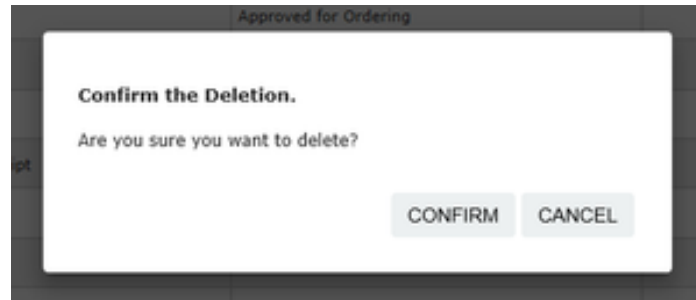
List of Meeting Attendance Notifications

	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
<input type="checkbox"/>		Meeting Attendance Notification	15 Days	Please Set Meeting Availability	Yes

List of Member Attendance Change Notification

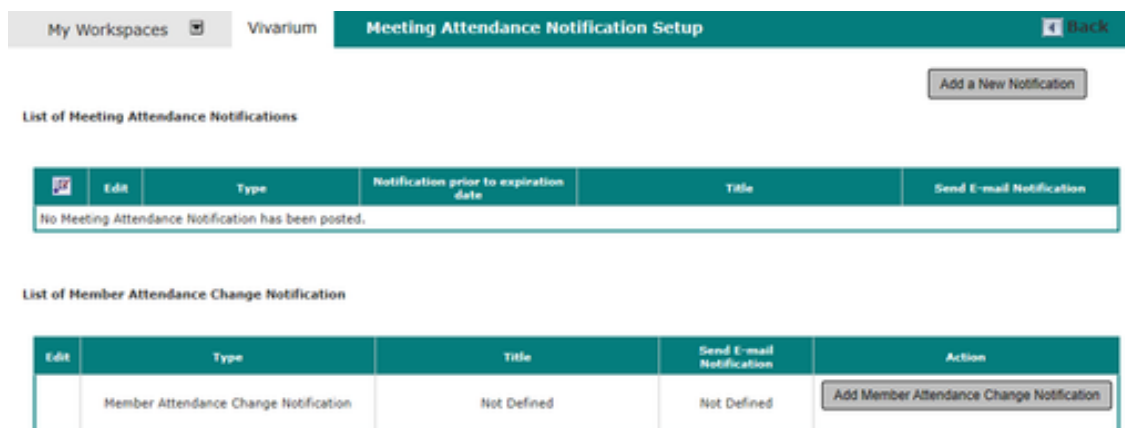
Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Not Defined	Not Defined	Add Member Attendance Change Notification

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 selected notification type is now unconfigured on the notification setup page.



The screenshot shows the "Meeting Attendance Notification Setup" page. At the top, there are navigation links for "My Workspaces" and "Vivarium", and a "Back" button. A button labeled "Add a New Notification" is visible. Below this, there are two sections:

- List of Meeting Attendance Notifications:** A table with columns: Edit, Type, Notification prior to expiration date, Title, and Send E-mail Notification. The table is empty, with a message: "No Meeting Attendance Notification has been posted."
- List of Member Attendance Change Notification:** A table with columns: Edit, Type, Title, Send E-mail Notification, and Action. The table contains one row with the following data: Type: "Member Attendance Change Notification", Title: "Not Defined", Send E-mail Notification: "Not Defined", and Action: "Add Member Attendance Change Notification".

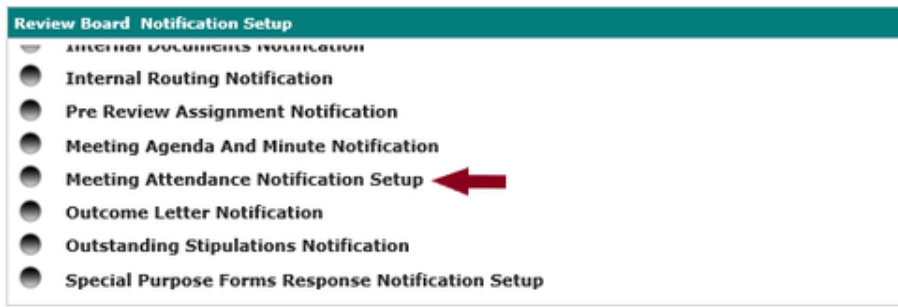
Notice that in this example, because the notification list is now empty, the **Edit** icon and **Delete Notification** button no longer appear.

Meeting Attendance Change Notification Setup

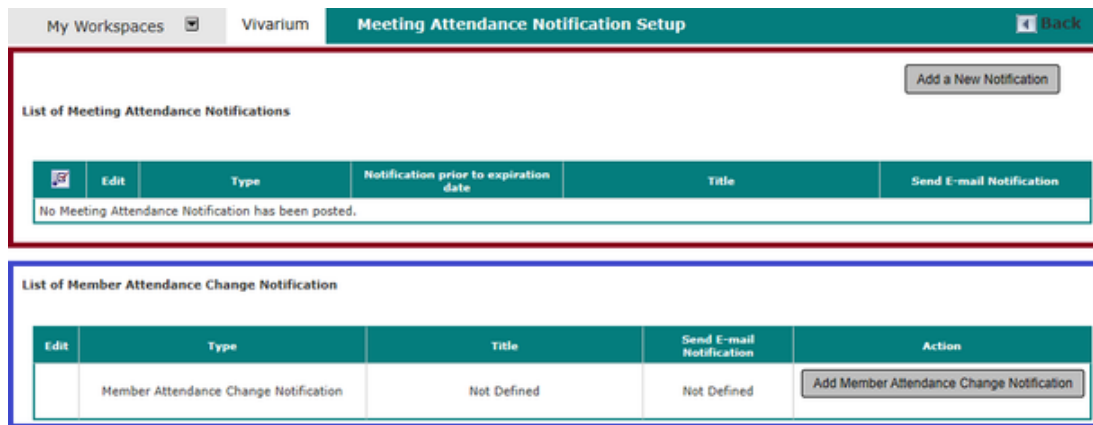
Two types of meeting attendance notification can be configured.

- the Meeting Attendance Notification is automatically sent to intended meeting attendees when the meeting is scheduled, and requests that the attendee set their availability for the meeting
- the Member Attendance Change Notification is automatically sent to the Coordinator when any intended attendee changes their meeting availability status

Both notification types are configured via the **Meeting Attendance Notification Setup** page. To access the page, navigate to Animal Resource Center > Review Board Administration > **Meeting Attendance Notification Setup** link.

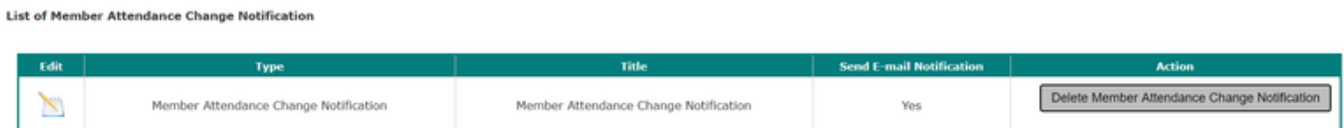


The **Meeting Attendance Notification Setup** page opens.



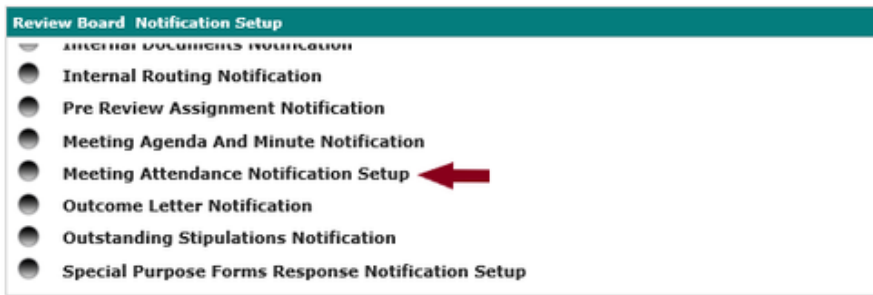
As highlighted by the blue box in the screenshot above, the Meeting Attendance Change notification appears in the lower part of the page. When no notifications of this type are configured the Title and Send E-mail Notification fields are set to “Not Defined” and an **Add Member Attendance Change Notification** button is provided.

As shown in the screenshot below, when the notification is configured an **Edit** icon is added for the notification. A **Delete Member Attendance Change Notification** button replaces the **Add a New Notification** button, indicating that only one notification of this type can be configured.

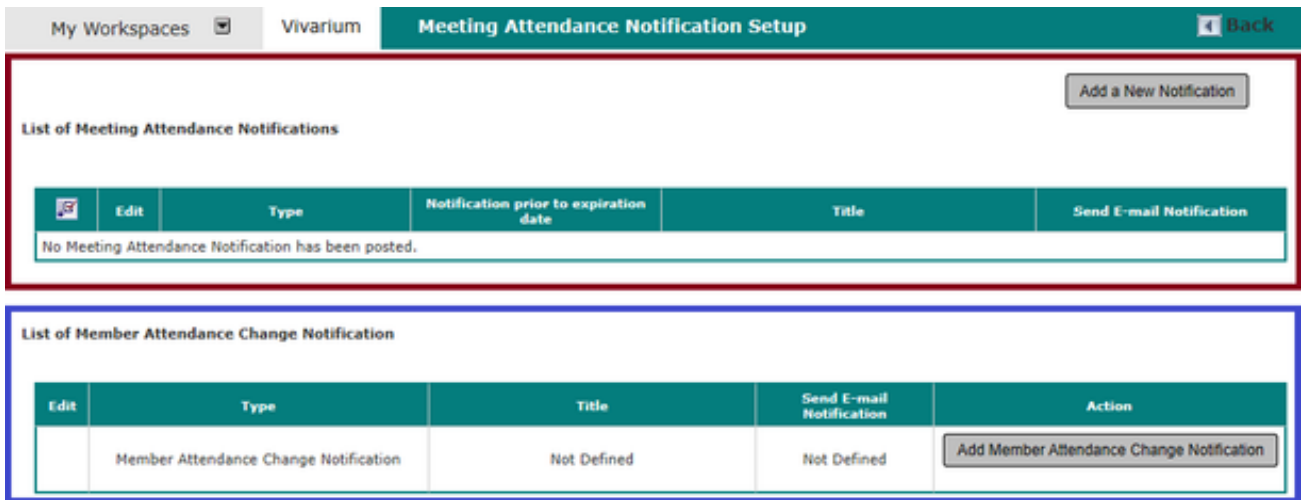


Add Meeting Attendance Change Notification

Navigate to Animal Resource Center > Review Board Administration > **Meeting Attendance Notification Setup** link.

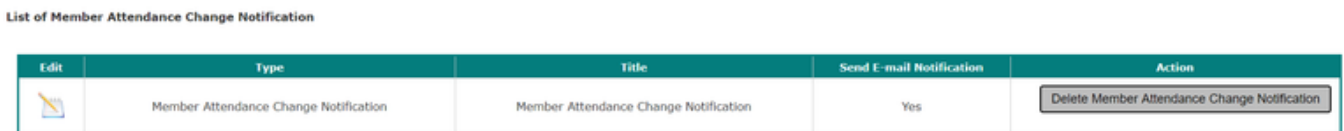


The Meeting Attendance Notification Setup page opens.



As highlighted by the blue box in the screenshot above, the Meeting Attendance Change notification appears in the lower part of the page. When no notifications of this type are configured the Title and Send E-mail Notification fields are set to "Not Defined" and an **Add Member Attendance Change Notification** button is provided.

As shown in the screenshot below, when the notification is configured an **Edit** icon is added for the notification. A **Delete Member Attendance Change Notification** button replaces the **Add a New Notification** button, indicating that only one notification of this type can be configured.



When the notification is unconfigured, click the **Add Member Attendance Change Notification** button.

[Add a New Notification](#)

List of Meeting Attendance Notifications

	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
No Meeting Attendance Notification has been posted.					















List of Member Attendance Change Notification

Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Not Defined	Not Defined	Add Member Attendance Change Notification

The **Edit Meeting Attendance Notification** page opens.

My Workspaces ▾ Vivarium **Edit Meeting Attendance Notification** ← Back

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

Type of Notification:	Member Attendance Change Notification
Title:	<input type="text" value="Member Attendance Change Notification"/>
Notification if within:	<input type="text" value="14"/> 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;"> <div style="background-color: #f0f0f0; padding: 2px; border-bottom: 1px solid #ccc;"> B I U  x₂ x² Verdana 11     </div> <div style="padding: 2px;">          </div> <div style="padding: 5px;"> <p style="font-size: 0.9em;">Be advised one or more meeting attendees have changed their meeting availability. Log in to iRIS to view details.]</p> </div> </div>

Enter the desired subject line of the notification email in the **Title** field.

Enter the number of days ahead of the meeting date the notification is to be sent in the **Notification if Within** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*


Click the **Save Notification** button to save the notification and close the page. The notification is configured in the lower portion of the **Meeting Attendance Setup** page.

Add a New Notification

List of Meeting Attendance Notifications

 Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
No Meeting Attendance Notification has been posted.				

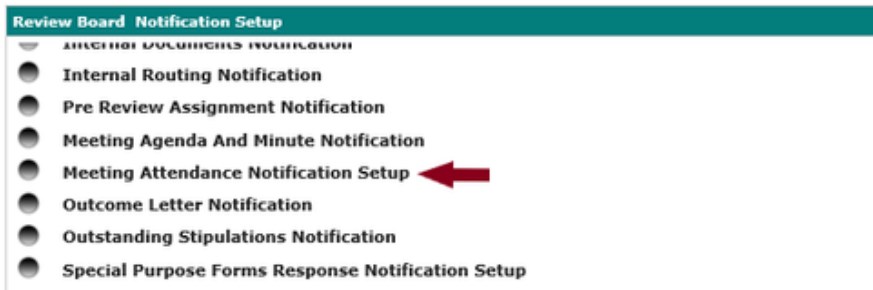
List of Member Attendance Change Notification

Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Member Attendance Change Notification	Yes	Delete Member Attendance Change Notification

As shown in the screenshot above, when the notification is configured an **Edit** icon is added for the notification. A **Delete Member Attendance Change Notification** button replaces the **Add Member Attendance Notification** button, indicating that only one notification of this type can be configured.

Edit Meeting Attendance Change Notification

Navigate to Animal Resource Center > Review Board Administration > **Meeting Attendance Notification Setup** link.




The **Meeting Attendance Notification Setup** page opens.

My Workspaces ▼ Vivarium **Meeting Attendance Notification Setup** ⏪ Back

Add a New Notification

List of Meeting Attendance Notifications

 Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
No Meeting Attendance Notification has been posted.				

List of Member Attendance Change Notification

Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Not Defined	Not Defined	Add Member Attendance Change Notification

As highlighted by the blue box in the screenshot above, the Meeting Attendance Change notification appears in the lower part of the page. When no notifications of this type are configured the Title and Send E-mail Notification fields are set to “Not Defined” and an **Add Member Attendance Change Notification** button is provided.

As shown in the screenshot below, when the notification is configured an **Edit** icon is added for the notification. A **Delete Member Attendance Change Notification** button replaces the **Add Member Attendance Notification** button, indicating that only one notification of this type can be configured.

List of Member Attendance Change Notification

Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Member Attendance Change Notification	Yes	Delete Member Attendance Change Notification

When the notification is configured, click its **Edit** icon.

My Workspaces Vivarium **Meeting Attendance Notification Setup** Back

[Add a New Notification](#)

List of Meeting Attendance Notifications

	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
No Meeting Attendance Notification has been posted.					

List of Member Attendance Change Notification

Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Member Attendance Change Notification	Yes	Delete Member Attendance Change Notification

The notification is opened for editing in the **Edit Meeting Attendance Notification** page.

My Workspaces Vivarium **Edit Meeting Attendance Notification** Back

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

Type of Notification:	Member Attendance Change Notification
Title:	<input type="text" value="Member Attendance Changes"/>
Notification if within:	<input type="text" value="14"/> 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>Be advised one or more meeting attendees have changed their meeting availability. Log in to iRIS to view details.</p> </div>

Make desired changes to the **Title** field, which is used as the subject line in the notification e-mail.

The **Notification if Within** field specifies how many days ahead of the meeting the notification is to be sent.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Make desired changes to the boilerplate text and Merge Codes entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the page. The notification is revised in the list in the lower portion of the **Meeting Attendance Setup** page.

My Workspaces ▾ Vivarium Meeting Attendance Notification Setup Back

Add a New Notification

List of Meeting Attendance Notifications

Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
No Meeting Attendance Notification has been posted.				

List of Member Attendance Change Notification

Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Member Attendance Changes	Yes	Delete Member Attendance Change Notification

Delete Meeting Attendance Change Notification

Navigate to Animal Resource Center > Review Board Administration > **Meeting Attendance Notification Setup** link.

Review Board Notification Setup


- Internal Routing Notification
- Pre Review Assignment Notification
- Meeting Agenda And Minute Notification
- Meeting Attendance Notification Setup ←
- Outcome Letter Notification
- Outstanding Stipulations Notification
- Special Purpose Forms Response Notification Setup

The **Meeting Attendance Notification Setup** page opens.

My Workspaces ▾ Vivarium Meeting Attendance Notification Setup ⏪ Back

[Add a New Notification](#)

List of Meeting Attendance Notifications

 Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
No Meeting Attendance Notification has been posted.				

List of Member Attendance Change Notification

Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Not Defined	Not Defined	Add Member Attendance Change Notification

As highlighted by the blue box in the screenshot above, the Meeting Attendance Change notification appears in the lower part of the page. When no notifications of this type are configured the Title and Send E-mail Notification fields are set to “Not Defined” and an **Add Member Attendance Change Notification** button is provided.

As shown in the screenshot below, when the notification is configured an **Edit** icon is added for the notification. A **Delete Member Attendance Change Notification** button replaces the **Add Member Attendance Notification** button, indicating that only one notification of this type can be configured.

List of Member Attendance Change Notification

Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Member Attendance Change Notification	Yes	Delete Member Attendance Change Notification


CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

Click the **Delete Member Attendance Change Notification** button.


My Workspaces ▾ Vivarium Meeting Attendance Notification Setup ⏪ Back

[Add a New Notification](#)

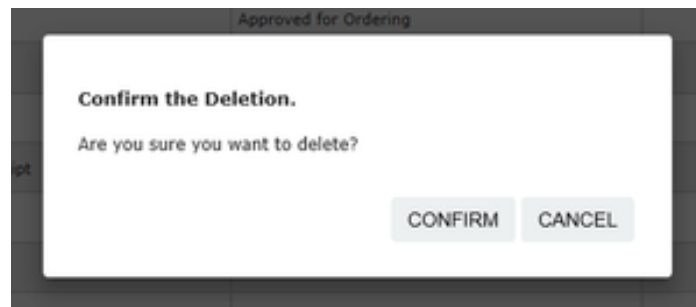
List of Meeting Attendance Notifications

 Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
No Meeting Attendance Notification has been posted.				

List of Member Attendance Change Notification

Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Member Attendance Changes	Yes	Delete Member Attendance Change Notification

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 selected notification type is now unconfigured on the notification setup page.

My Workspaces ▼ Vivarium **Meeting Attendance Notification Setup** 1 [Back](#)

[Add a New Notification](#)

List of Meeting Attendance Notifications

	Edit	Type	Notification prior to expiration date	Title	Send E-mail Notification
No Meeting Attendance Notification has been posted.					

List of Member Attendance Change Notification

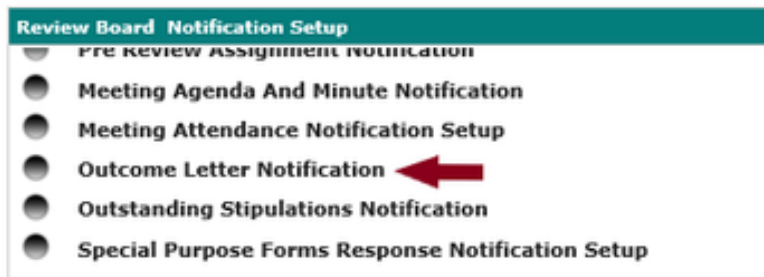
Edit	Type	Title	Send E-mail Notification	Action
	Member Attendance Change Notification	Not Defined	Not Defined	Add Member Attendance Change Notification

Outcome Letter Notifications

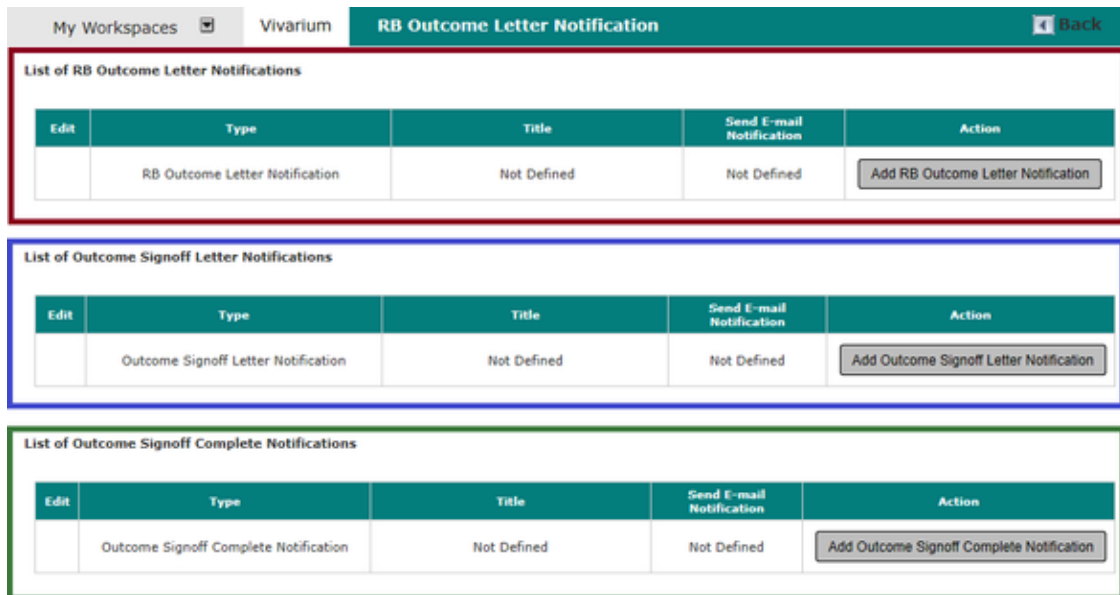
Three types of review board outcome notifications can be configured in the iRIS™ system:

- RB Outcome Letter Notification, automatically sent to applicable study personnel when an outcome letter is sent
- Outcome Signoff Letter Notification, automatically sent to applicable study personnel when an outcome letter signoff task is assigned
- Outcome Signoff Complete Notification, automatically sent to the Assigned Analyst when an outcome letter signoff task is completed

All three notification types are configured via the **RB Outcome Letter Notification** page. To access the page, navigate to Animal Resource Center > Review Board Administration > **Outcome Letter Notification** link.



The **RB Outcome Letter Notification** setup page is opened.



The **RB Outcome Letter Notification** is set up via the top section of the page (red box).

The **Outcome Signoff Letter Notification** is set up via the middle section of the page (blue box).

The **Outcome Signoff Complete Notification** is set up via the bottom section of the page (green box).

As shown in the screenshot below:

- only one version of each notification type can be configured, no add button is provided for notification types that are already configured
- until a notification type is configured, its **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and an add button is provided for the notification (red boxes)
- after a notification type is configured, its **Title** and **Send E-Mail Notification** fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

My Workspaces Vivarium **RB Outcome Letter Notification** Back

List of RB Outcome Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Letter Notification	Outcome Letter Notification	Yes	Delete Outcome Letter Notification

List of Outcome Signoff Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification

List of Outcome Signoff Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification

As shown in the screenshot below, the configuration page for all three of these notification types contains the same fields.

My Workspaces Vivarium **Edit RB Outcome Letter Notification** Back

Type of Notification:	RB Outcome Letter Notification
Title:	<input type="text"/>
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>

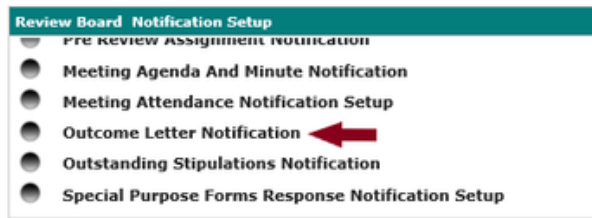
The **Title** field is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

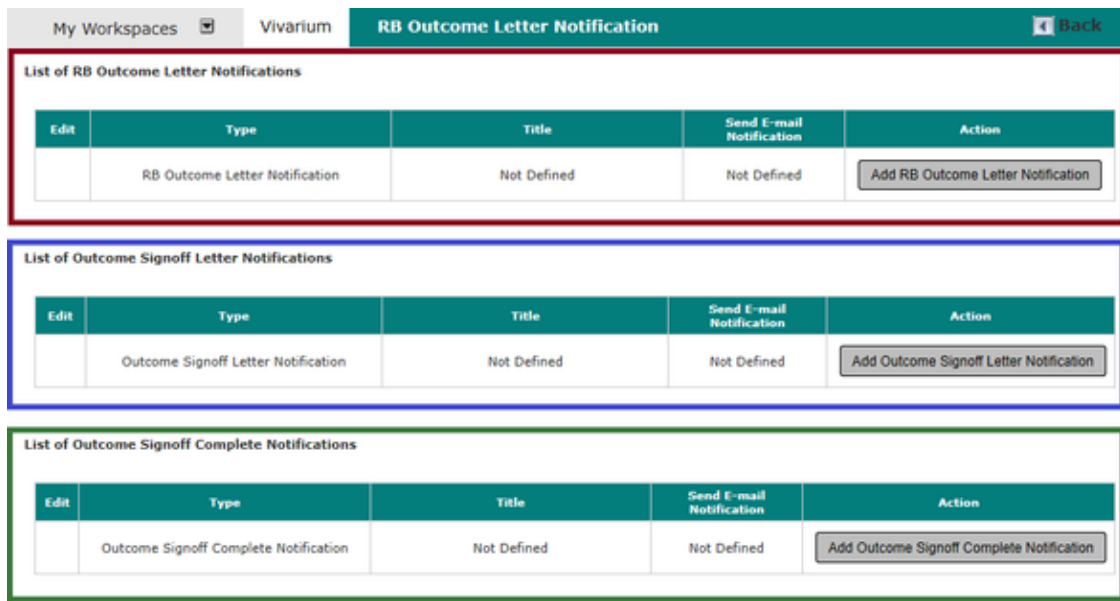
Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Add Outcome Letter Notification

Navigate to Animal Resource Center > Review Board Administration > **Outcome Letter Notification** link.



The **RB Outcome Letter Notification** setup page is opened.



The **RB Outcome Letter Notification** is set up via the top section of the page (red box).

The **Outcome Signoff Letter Notification** is set up via the middle section of the page (blue box).


The **Outcome Signoff Complete Notification** is set up via the bottom section of the page (green box).

As shown in the screenshot below:

- only one version of each notification type can be configured, no add button is provided for notification types that are already configured
- until a notification type is configured, its **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and an add button is provided for the notification (red boxes)
- after a notification type is configured, its **Title** and **Send E-Mail Notification** fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

My Workspaces ▾ Vivarium **RB Outcome Letter Notification** Back

List of RB Outcome Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Letter Notification	Outcome Letter Notification	Yes	Delete Outcome Letter Notification

List of Outcome Signoff Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification

List of Outcome Signoff Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification

Click the applicable Add button to configure the desired notification type. The selected notification type is opened in the **Edit RB Outcome Letter Notification** page.

My Workspaces ▾ Vivarium **Edit RB Outcome Letter Notification** Back

Insert Merge Code Save Notification

Type of Notification:	RB Outcome Letter Notification
Title:	Outcome Letter Notification
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
E-mail Content:	<div style="border: 1px solid black; padding: 5px;"> <p>Be advised the review board has generated an outcome letter for one or more study(ies) to which you are assigned. Please log in to iRIS to view the letter(s).</p> <p>[%rb_name%]</p> </div>

Enter the desired subject line of the notification email in the **Title** field.


Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration page. The notification is configured on the **RB Outcome Letter Notification** page.

My Workspaces ▼ Vivarium **RB Outcome Letter Notification** ⌕ Back

List of RB Outcome Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Letter Notification	Outcome Letter Notification	Yes	Delete Outcome Letter Notification

List of Outcome Signoff Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification

List of Outcome Signoff Complete Notifications

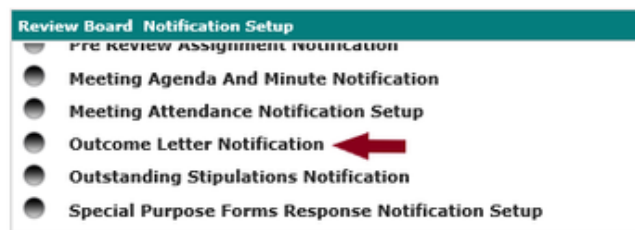
Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification

Notice that a **Delete Notification** button now appears in place of the **Add Notification** button, indicating that no additional versions of this notification type can be created. This is the case for all outcome letter notifications when configured.

Also notice that an icon is now available in the **Edit** column for the configured notification, indicating that it can be revised. This is the case for all outcome letter notifications when configured.

Edit Outcome Letter Notification

Navigate to Animal Resource Center > Review Board Administration > **Outcome Letter Notification** link.



The **RB Outcome Letter Notification** setup page is opened.

My Workspaces ▼ Vivarium **RB Outcome Letter Notification** ⌕ Back

List of RB Outcome Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Letter Notification	Not Defined	Not Defined	Add RB Outcome Letter Notification

List of Outcome Signoff Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification

List of Outcome Signoff Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification

The **RB Outcome Letter Notification** is set up via the top section of the page (red box).

The **Outcome Signoff Letter Notification** is set up via the middle section of the page (blue box).

The **Outcome Signoff Complete Notification** is set up via the bottom section of the page (green box).

As shown in the screenshot below:


— only one version of each notification type can be configured, no add button is provided for notification types that are already configured

— until a notification type is configured, its **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and an add button is provided for the notification (red boxes)

— after a notification type is configured, its **Title** and **Send E-Mail Notification** fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

The screenshot shows a web interface for configuring notifications. At the top, there is a header with 'My Workspaces' (dropdown), 'Vivarium', and 'RB Outcome Letter Notification' (title) with a 'Back' button. Below the header are three sections, each with a table of notification types.

List of RB Outcome Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Letter Notification	Outcome Letter Notification	Yes	Delete Outcome Letter Notification

List of Outcome Signoff Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification


List of Outcome Signoff Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification

Click the icon in the **Edit** column for the applicable notification type.

This screenshot is identical to the one above, but with a red box highlighting the 'Edit' icon in the first table's row.

List of RB Outcome Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Letter Notification	Outcome Letter Notification	Yes	Delete Outcome Letter Notification

List of Outcome Signoff Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification

List of Outcome Signoff Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification

The selected notification type is opened for editing in the **Edit RB Outcome Letter Notification** page.

My Workspaces ▾ Vivarium **Edit RB Outcome Letter Notification** [Back](#)

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

Type of Notification:	RB Outcome Letter Notification
Title:	Review Board Outcome Letter Notification
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
E-mail Content:	<p>Be advised the review board has generated an outcome letter for one or more study(ies) to which you are assigned. Please log in to iRIS to view the letter(s).</p> <p>[%rb_name%]</p>

Make desired changes to the **Title** field, which is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Make desired changes to the boilerplate text and Merge Codes entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save changes and close the configuration panel. The notification is revised on the **RB Outcome Letter Notification** page.

My Workspaces ▾ Vivarium **RB Outcome Letter Notification** [Back](#)

List of RB Outcome Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Letter Notification	Review Board Outcome Letter Notification	Yes	Delete Outcome Letter Notification

List of Outcome Signoff Letter Notifications

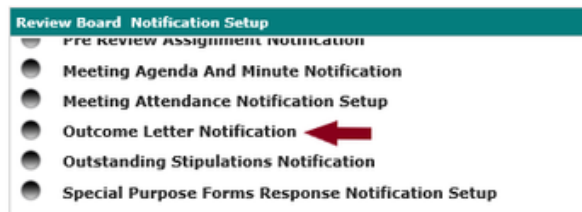
Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification

List of Outcome Signoff Complete Notifications

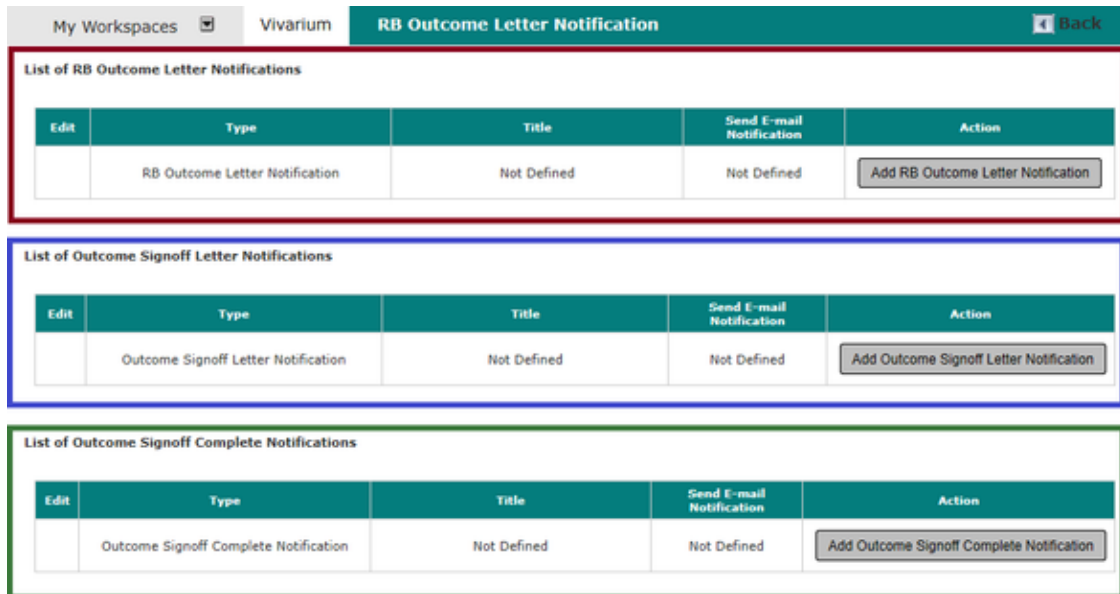
Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification

Delete Outcome Letter Notification

Navigate to Animal Resource Center > Review Board Administration > **Outcome Letter Notification** link.



The **RB Outcome Letter Notification** setup page is opened.



The **RB Outcome Letter Notification** is set up via the top section of the page (red box).

The **Outcome Signoff Letter Notification** is set up via the middle section of the page (blue box).

The **Outcome Signoff Complete Notification** is set up via the bottom section of the page (green box).

As shown in the screenshot below:

- only one version of each notification type can be configured, no add button is provided for notification types that are already configured
- until a notification type is configured, its **Title** and **Send E-Mail Notification** fields are set to “Not Defined” and an add button is provided for the notification (red boxes)
- after a notification type is configured, its **Title** and **Send E-Mail Notification** fields are populated and an **Edit** icon and **Delete** button are provided for the notification (red arrows)

My Workspaces ▼ Vivarium **RB Outcome Letter Notification** ⌵ Back

List of RB Outcome Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Letter Notification	Outcome Letter Notification	Yes	Delete Outcome Letter Notification

List of Outcome Signoff Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification

List of Outcome Signoff Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

Click the delete button for the applicable notification type.

My Workspaces ▼ Vivarium **RB Outcome Letter Notification** ⌵ Back

List of RB Outcome Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Letter Notification	Review Board Outcome Letter Notification	Yes	Delete Outcome Letter Notification

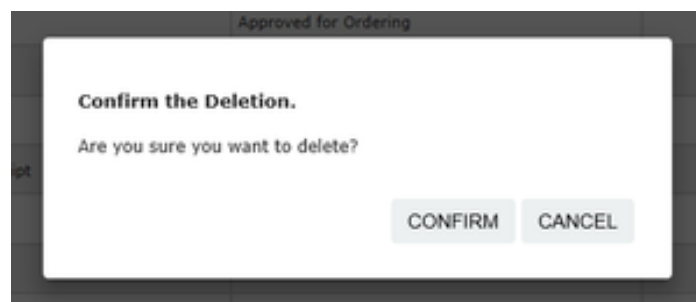
List of Outcome Signoff Letter Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification

List of Outcome Signoff Complete Notifications

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification

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 selected notification type is now unconfigured on the notification setup page.

Edit	Type	Title	Send E-mail Notification	Action
	RB Outcome Letter Notification	Not Defined	Not Defined	Add RB Outcome Letter Notification

Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Letter Notification	Not Defined	Not Defined	Add Outcome Signoff Letter Notification

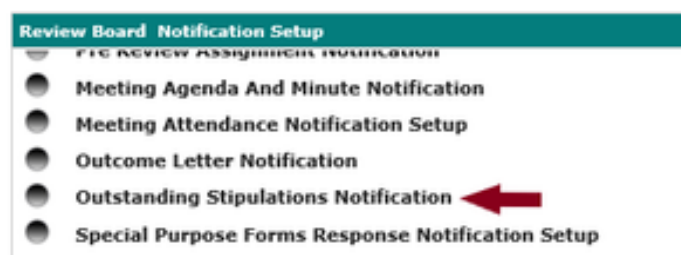
Edit	Type	Title	Send E-mail Notification	Action
	Outcome Signoff Complete Notification	Not Defined	Not Defined	Add Outcome Signoff Complete Notification

Notice that the **Edit** icon and **Delete Notification** button no longer appear, and an **Add Notification** button is provided for the now-unconfigured notification type.

Outstanding Stipulations Notifications

Outstanding stipulation notifications can be configured to automatically alert applicable study personnel (generally the PI, Study Contact, and Assigned Analyst) when a stipulation is entered. Different versions of this notification type can be configured to address different stipulation requests.

This type of notification is configured on the **Outstanding Stipulations Notification Setup** page. To access the page, navigate to Animal Resource Center > Review Board Administration > **Outstanding Stipulations Notification** link.



The **Outstanding Stipulations Notification Setup** page is opened.

My Workspaces Vivarium **Outstanding Stipulations Notification Setup** Back

Add a New Notification

List of Outstanding Stipulations Notifications

Edit	Type	Notification prior to due date	Title	Send E-mail Notification
No Outstanding Stipulations Notification has been posted.				

The **Edit Outstanding Stipulations Notification** page is used for configuration of this notification type.

My Workspaces ▾ Vivarium **Edit Outstanding Stipulations Notification** [Back](#)

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

Type of Notification:	Outstanding Stipulations Notification
Title:	<input type="text"/>
Notification if within:	<input type="text" value="30"/> in days.
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Send To:	<input checked="" type="checkbox"/> Principal Investigator <input checked="" type="checkbox"/> Study Contact
E-mail Content:	<div style="border: 1px solid #ccc; padding: 5px;"><p>Rich text editor toolbar: Bold, Italic, Underline, Strikethrough, x₂, x², Font Family, 12, Bulleted list, Numbered list, Indent, Outdent, Link, Unlink, Image, Undo, Redo, Print, Refresh, Close.</p><div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div></div>

The **Title** field is used as the subject line in the notification e-mail.

The **Notification if Within** field specifies how many days ahead of the due date the notification is to be sent.

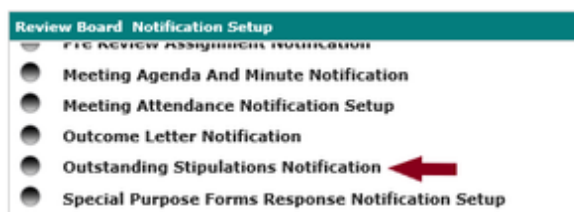
If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Select checkboxes for “Principal Investigator” and “Study Contact” are provided in the **Send To** field, to specify which study personnel should receive the notification.

Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Add Outstanding Stipulations Notification

Navigate to Animal Resource Center > Review Board Administration > **Outstanding Stipulations Notification** link.



The **Outstanding Stipulations Notification Setup** page opens.



Click the **Add a New Notification** button. The **Edit Outstanding Stipulations Notification** page opens.

Enter the desired subject line of the notification email in the **Title** field.

Enter the number of days ahead of the due date the notification is to be sent in the **Notification if Within** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

In the **Send To** field, select the checkbox for “Principal Investigator”, “Study Contact” or both to add them to distribution.



Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is configured on the **Outstanding Stipulations Notification Setup** page.

My Workspaces ▾ Vivarium **Outstanding Stipulations Notification Setup** [Back](#)

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

List of Outstanding Stipulations Notifications

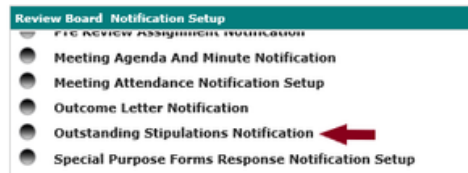
	Edit	Type	Notification prior to due date	Title	Send E-mail Notification
<input type="checkbox"/>		Outstanding Stipulations Notification	30 Days	Outstanding Stipulation - Application Correction(s) Required	Yes

Notice that the **Add a New Notification** button remains, indicating that additional notifications of this type can be created for different types of stipulations.

Also notice that an icon is now available in the **Edit** column for the configured notification, indicating that it can be revised, and a **Delete Notification(s)** button is now available as well.

Edit Outstanding Stipulations Notification

Navigate to Animal Resource Center > Review Board Administration > **Outstanding Stipulations Notification** link.





The **Outstanding Stipulations Notification Setup** page opens.

My Workspaces ▾ Vivarium **Outstanding Stipulations Notification Setup** [Back](#)

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

List of Outstanding Stipulations Notifications

	Edit	Type	Notification prior to due date	Title	Send E-mail Notification
<input type="checkbox"/>		Outstanding Stipulations Notification	30 Days	Outstanding Stipulation - Application Correction(s) Required	Yes

Click the icon in the **Edit** column for the applicable notification. The notification is opened for editing in the **Edit Outstanding Stipulations Notification** page.

My Workspaces ▾ Vivarium **Edit Outstanding Stipulations Notification** [Back](#)

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

Type of Notification:	Outstanding Stipulations Notification
Title:	Outstanding Stipulation - Application Correction(s) Required
Notification if within:	15 in days.
Send E-Mail Notification:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Send To:	<input checked="" type="checkbox"/> Principal Investigator <input checked="" type="checkbox"/> Study Contact
E-mail Content:	<div style="border: 1px solid black; padding: 5px;"> <p>Font Family 12</p> <p>Please be advised one or more application corrections are required. Please log in to iRES to view details. [%rb_name%]</p> </div>

Make desired changes to the **Title** field, which is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

In the **Send To** field, select the checkbox for “Principal Investigator”, “Study Contact” or both to add them to distribution.

Make desired changes to the boilerplate text and Merge Codes entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button to save the notification and close the configuration panel. The notification is revised on the **Outstanding Stipulations Notification Setup** page.

My Workspaces ▾ Vivarium **Outstanding Stipulations Notification Setup** [Back](#)

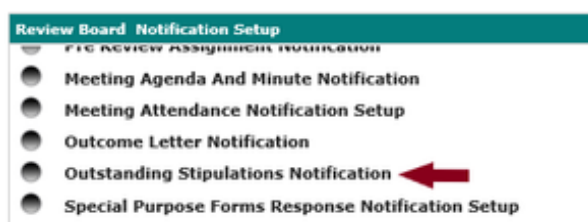
[Add a New Notification](#) [Delete Notification\(s\)](#)

List of Outstanding Stipulations Notifications

	Edit	Type	Notification prior to due date	Title	Send E-mail Notification
<input type="checkbox"/>		Outstanding Stipulations Notification	15 Days	Outstanding Stipulation - Application Correction(s) Required	Yes

Delete Outstanding Stipulations Notification

Navigate to Animal Resource Center > Review Board Administration > **Outstanding Stipulations Notification** link.



The **Outstanding Stipulations Notification Setup** page opens.

My Workspaces ▼ Vivarium **Outstanding Stipulations Notification Setup** ⏪ Back

Add a New Notification Delete Notification(s)

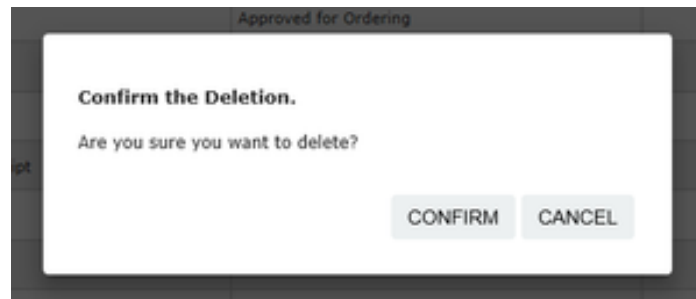
List of Outstanding Stipulations Notifications

<input type="checkbox"/>	Edit	Type	Notification prior to due date	Title	Send E-mail Notification
<input checked="" type="checkbox"/>		Outstanding Stipulations Notification	15 Days	Outstanding Stipulation - Application Correction(s) Required	Yes

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

Select the checkbox in the far-left column for the applicable notification and click the **Delete Notification(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 selected notification type is now unconfigured on the notification setup page.

My Workspaces ▼ Vivarium **Outstanding Stipulations Notification Setup** ⏪ Back

Add a New Notification

List of Outstanding Stipulations Notifications

	Edit	Type	Notification prior to due date	Title	Send E-mail Notification
No Outstanding Stipulations Notification has been posted.					

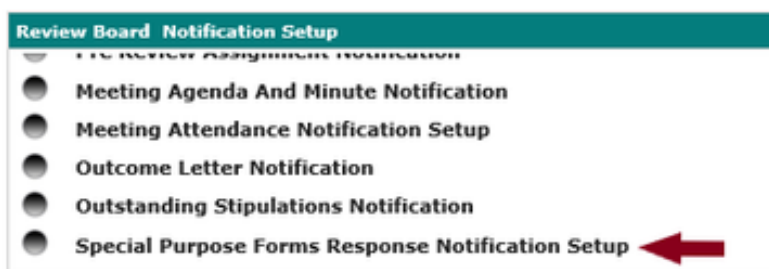
If deleting the notification has left the list on this page empty the **Edit** icon and **Delete Notification(s)** button no longer appear.

Special Purpose Forms Response Notifications

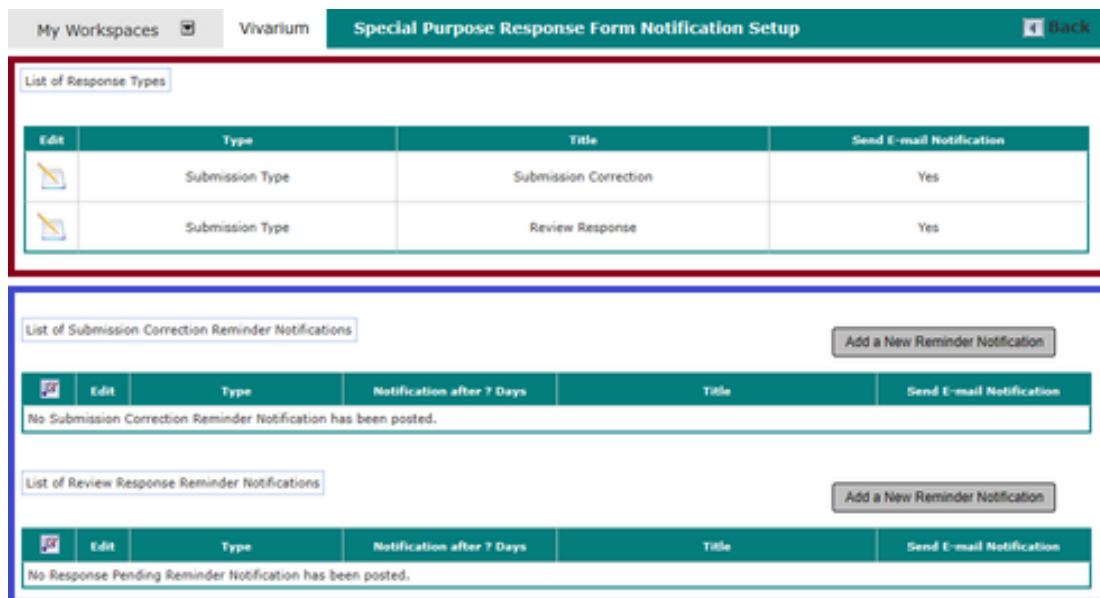
Notifications related to submission corrections and review responses can be configured in the iRIS™ system on the **Special Purpose Response Form Notification Setup** page. When configured, these notifications are automatically sent to applicable study personnel as follows:

- a Submission Correction notification is sent when a request for submission corrections is saved to the system
- a Review Response notification is sent when a board review response request is saved to the system
- a Submission Correction Reminder notification is sent X days before the due date for requested submission corrections, where X is a number specified in the notification configuration form
- a Review Response Reminder notification is sent X days before the due date for a requested review response, where X is a number specified in the notification configuration form

All four of these notification types are configured on the **Special Purpose Response Form Notification Setup** page. To access the page, navigate to Animal Resource Center > Review Board Administration > **Special Purpose Forms Response Notification Setup** link.



The **Special Purpose Response Form Notification Setup** page is opened.



Submission Correction and Review Response notification types are configured in the upper portion of the page (red box in screenshot above).

Submission Correction Reminder and Response Pending Reminder notification types are configured in the lower portion of the page (blue box in screenshot above).

The same configuration form, shown below, is used for Submission Correction and Review Response notification types.

My Workspaces ▾ Vivarium **Edit Submission Notice** [Back](#)

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

Title:	<input type="text" value="Submission Correction"/>
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>One or more errors have been found in your submission. Please see the specific correction request(s) in your workspace Task List, make the requested corrections and resubmit.</p> <p>[%b_name%]</p> </div>

The **Title** field is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

The same configuration form, shown below, is used for both Submission Correction Reminder and Response Pending Reminder notification types.

My Workspaces ▾ Vivarium **Edit Submission Notice** [Back](#)

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

Type of Notification:	Special Purpose Form Correction Reminder Notification
Title:	<input type="text"/>
Notification if within:	<input type="text" value="30"/> 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>Rich text editor toolbar with options for Bold, Italic, Underline, Link, Unlink, Subscript, Superscript, Font Family, Font Size (12), Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, and other standard editing functions.</p> </div>

The **Title** field is used as the subject line in the notification e-mail.

The **Notification if Within** field specifies how many days ahead of the due date the notification is to be sent.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

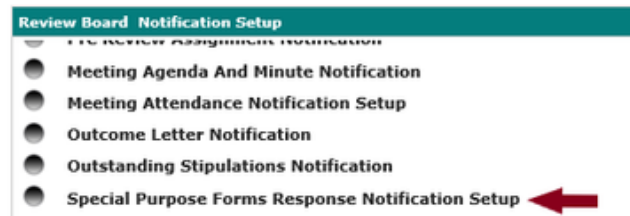
Boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Submission Response Notification Setup

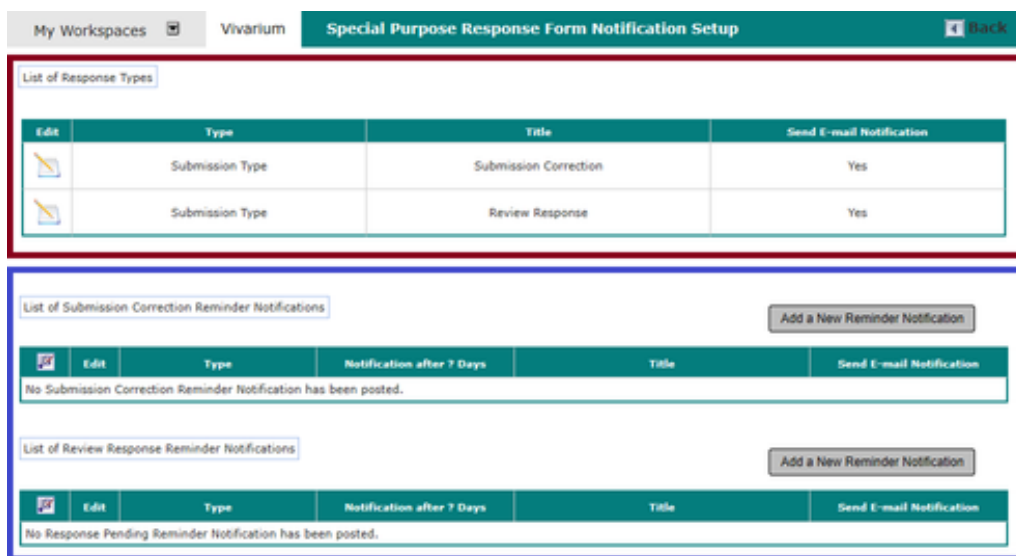
Two types of submission response notifications are configured in the iRIS™ system on the **Special Purpose Response Form Notification Setup** page:

- a Submission Correction notification is sent when a request for submission corrections is saved to the system
- a Review Response notification is sent when a board review response request is saved to the system

Both notification types are configured on the **Special Purpose Response Form Notification Setup** page. To access the page, navigate to Animal Resource Center > Review Board Administration > **Special Purpose Forms Response Notification Setup** link.



The **Special Purpose Response Form Notification Setup** page is opened.



Submission response notifications are configured in the upper portion of the page (red box in screenshot above).

Notice that while an **Edit** icon is provided for these notifications in the far-left column, there are no add or delete buttons. This means that only one version of each notification type can be configured, and that the configured notifications cannot be deleted.

Click the **Edit** icon for the applicable notification type.

My Workspaces ▾ Vivarium **Special Purpose Response Form Notification Setup** Back

List of Response Types

Edit	Type	Title	Send E-mail Notification
	Submission Type	Submission Correction	Yes
	Submission Type	Review Response	Yes

List of Submission Correction Reminder Notifications Add a New Reminder Notification

Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Submission Correction Reminder Notification has been posted.				

List of Review Response Reminder Notifications Add a New Reminder Notification

Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Response Pending Reminder Notification has been posted.				

The selected notification type is opened in the **Edit Submission Notice** page for revision. The same configuration form, shown below, is used for both types.

My Workspaces ▾ Vivarium **Edit Submission Notice** Back

Insert Merge Code Save Notification

Title:	Submission Corrections 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;"> <p>One or more errors have been found in your submission. Please see the specific correction request(s) in your workspace Task List, make the requested corrections and resubmit.</p> <p>[%rb_name%]</p> </div>

Make desired changes in the **Title** field, which is used as the subject line in the notification e-mail.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Make desired changes to the boilerplate text and Merge Codes entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button. The selected notification type is revised on the **Special Purpose Response Form Notification Setup** page.

My Workspaces Vivarium **Special Purpose Response Form Notification Setup** Back

List of Response Types

Edit	Type	Title	Send E-mail Notification
	Submission Type	Submission Corrections Required	Yes
	Submission Type	Review Response	Yes

List of Submission Correction Reminder Notifications

[Add a New Reminder Notification](#)

	Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Submission Correction Reminder Notification has been posted.					

List of Review Response Reminder Notifications

[Add a New Reminder Notification](#)

	Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Response Pending Reminder Notification has been posted.					

Submission Response Reminder Notification Setup

Two types of submission response notifications are configured in the iRIS™ system on the **Special Purpose Response Form Notification Setup** page:

- a Submission Correction notification is sent when a request for submission corrections is saved to the system
- a Review Response notification is sent when a board review response request is saved to the system

Both notification types are configured on the **Special Purpose Response Form Notification Setup** page. To access the page, navigate to Animal Resource Center > Review Board Administration > **Special Purpose Forms Response Notification Setup** link.

Review Board Notification Setup

- Meeting Agenda And Minute Notification**
- Meeting Attendance Notification Setup**
- Outcome Letter Notification**
- Outstanding Stipulations Notification**
- Special Purpose Forms Response Notification Setup**

The **Special Purpose Response Form Notification Setup** page is opened.

Submission Correction Reminder and Response Pending Reminder notification types are configured in the lower portion of the page (blue box in screenshot above).

The same configuration form, shown below, is used for addition or revision of both reminder types.

The **Title** field is used as the subject line in the notification e-mail.

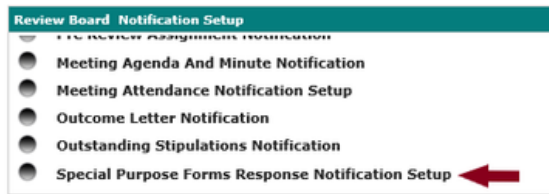
The **Notification if Within** field specifies how many days ahead of the due date the notification is to be sent.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

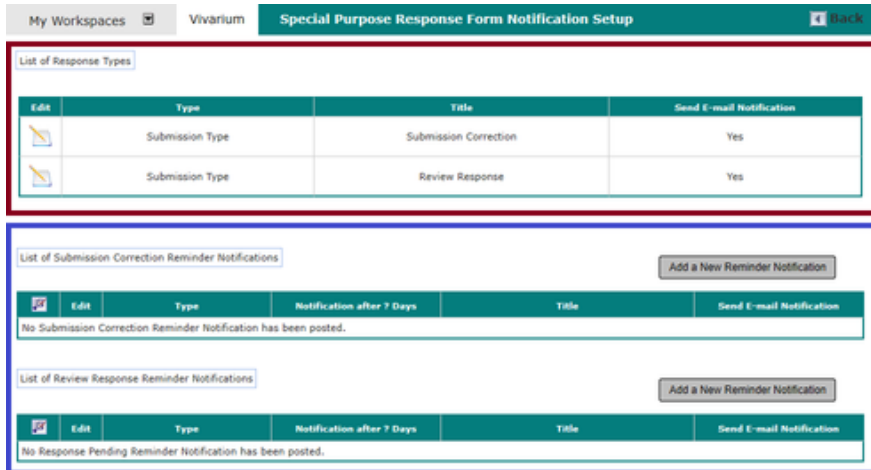
Desired boilerplate text and Merge Codes are entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Add Submission Response Reminder Notification

Navigate to Animal Resource Center > Review Board Administration > **Special Purpose Forms Response Notification Setup** link.

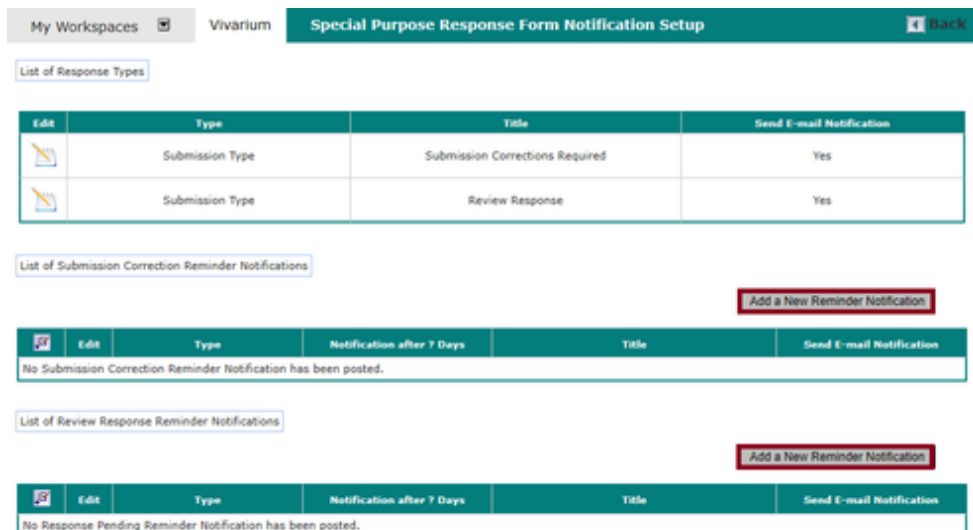


The **Special Purpose Response Form Notification Setup** page is opened.



Submission Correction Reminder and Response Pending Reminder notification types are configured in the lower portion of the page (blue box in screenshot above).

Click the **Add a New Reminder Notification** button for the applicable notification type.



The **Edit Submission Notice** page opens for configuration of the reminder. The same configuration form, shown below, is used for both reminder notification types.

My Workspaces Vivarium **Edit Submission Notice** Back

Insert Merge Code **Save Notification**

Type of Notification:	Special Purpose Form Correction Reminder Notification
Title:	<input type="text" value="Submission Correction Reminder"/>
Notification if within:	<input type="text" value="30"/> in days.
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>Requested corrections on one or more submissions have not yet been received. Please login to iRIS to view details, then make the requested corrections and resubmit.</p> <p>[%rb_name%]</p> </div>

Enter the desired subject line of the notification email in the **Title** field.

Enter the number of days ahead of the due date the notification is to be sent in the **Notification if Within** field.

Select “Yes” or “No” for **Send E-Mail Notification**. If “Yes” is selected the notification is sent to the recipient(s). If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Enter desired boilerplate text and Merge Codes in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button. The selected reminder type is added on the **Special Purpose Response Form Notification Setup** page.

My Workspaces Vivarium **Special Purpose Response Form Notification Setup** Back

List of Response Types

Edit	Type	Title	Send E-mail Notification
	Submission Type	Submission Corrections Required	Yes
	Submission Type	Review Response	Yes

List of Submission Correction Reminder Notifications

Add a New Reminder Notification **Delete Reminder Notification(s)**

	Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
<input type="checkbox"/>		Special Purpose Form Correction Reminder Notification	30 Days	Submission Correction Reminder	Yes

List of Review Response Reminder Notifications

Add a New Reminder Notification

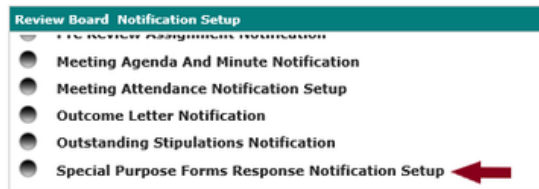
	Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Response Pending Reminder Notification has been posted.					

Notice that an **Edit** icon is available for the reminder, and now that at least one reminder of this type is configured a **Delete Reminder Notification(s)** button is added for the type.

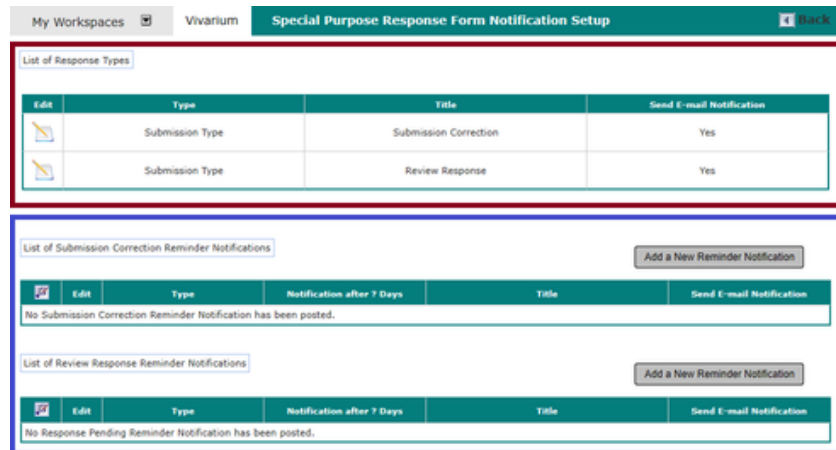
The **Add a New Reminder Notification** button remains, indicating that multiple versions of this reminder type can be configured.

Edit Submission Response Reminder Notification

Navigate to Animal Resource Center > Review Board Administration > **Special Purpose Forms Response Notification Setup** link.

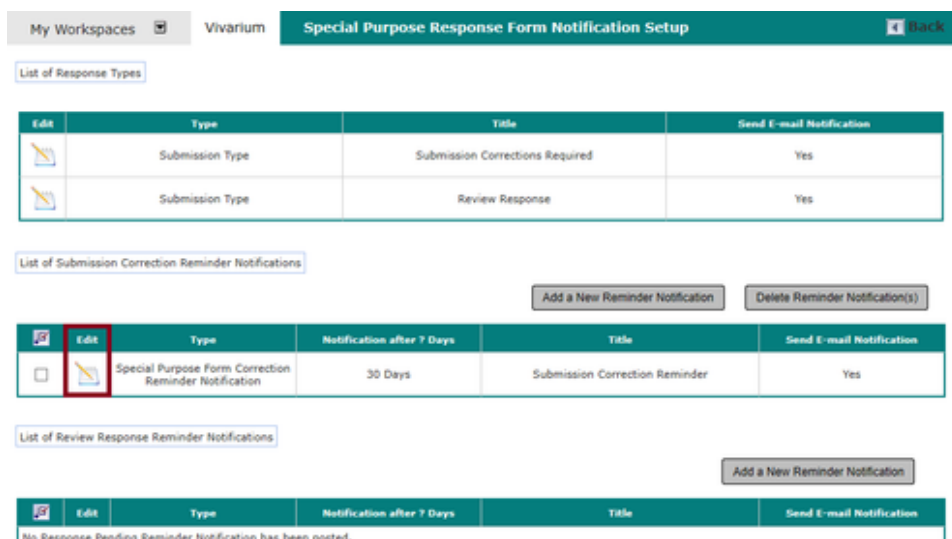


The **Special Purpose Response Form Notification Setup** page is opened.



Submission Correction Reminder and Response Pending Reminder notification types are configured in the lower portion of the page (blue box in screenshot above).

Click the **Edit** icon for the applicable notification type.



The notification is opened for editing in the **Edit Submission Notice** page. The same configuration form, shown below, is used for both reminder notification types.

My Workspaces ▼ Vivarium **Edit Submission Notice** Back

Insert Merge Code Save Notification

Type of Notification:	Special Purpose Form Correction Reminder Notification
Title:	<input type="text" value="Submission Correction Reminder"/>
Notification if within:	<input type="text" value="15"/> in days.
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>Requested corrections on one or more submissions have not yet been received. Please login to iRIS to view details, then make the requested corrections and resubmit.</p> <p>[%rb_name%]</p> </div>

Make desired changes to the **Title** field, which is used as the subject line in the notification e-mail.

The **Notification if Within** field specifies how many days ahead of the due date the notification is to be sent.

If “Yes” is selected for **Send E-Mail Notification** the notification is sent to the recipient. If “No” is selected the notification is saved to the system for recordkeeping purposes but is not sent.

Make desired changes to the boilerplate text and Merge Codes entered in the **E-Mail Content** text editor. *See the Using Merge Codes in Notifications section of this manual for more information.*

Click the **Save Notification** button. The selected reminder type is revised on the **Special Purpose Response Form Notification Setup** page.

My Workspaces ▼ Vivarium **Special Purpose Response Form Notification Setup** Back

List of Response Types

Edit	Type	Title	Send E-mail Notification
	Submission Type	Submission Corrections Required	Yes
	Submission Type	Review Response	Yes

List of Submission Correction Reminder Notifications

Add a New Reminder Notification Delete Reminder Notification(s)

Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
	Special Purpose Form Correction Reminder Notification	15 Days	Submission Correction Reminder	Yes

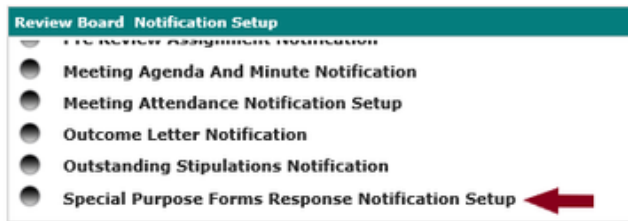
List of Review Response Reminder Notifications

Add a New Reminder Notification

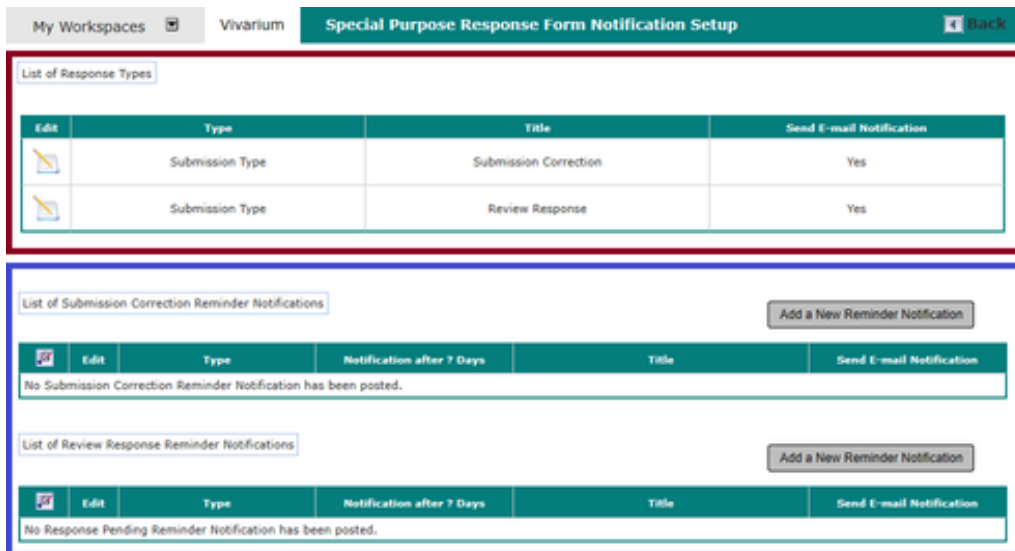
Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Response Pending Reminder Notification has been posted.				

Delete Submission Response Reminder Notification

Navigate to Animal Resource Center > Review Board Administration > **Special Purpose Forms Response Notification Setup** link.



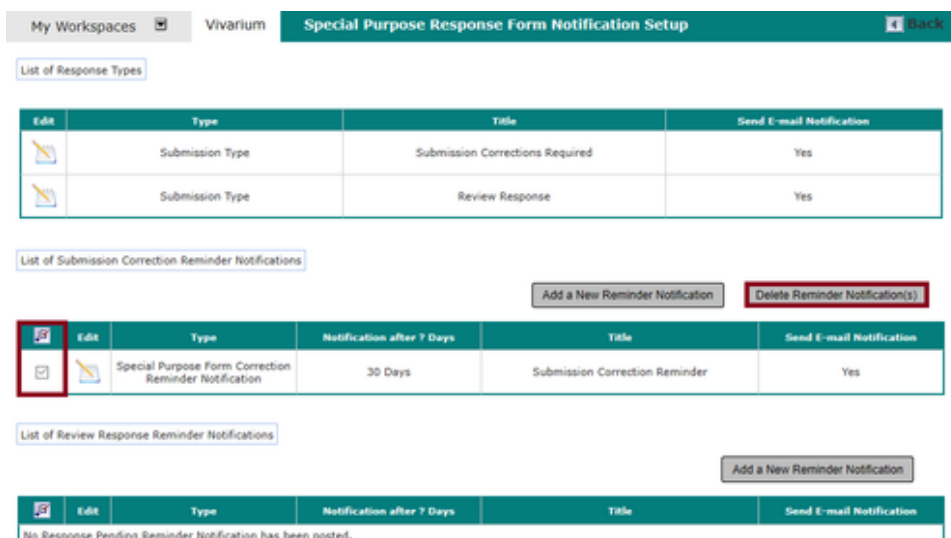
The **Special Purpose Response Form Notification Setup** page is opened.



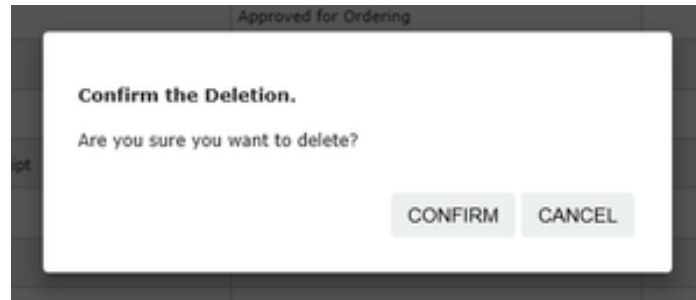
Submission Correction Reminder and Response Pending Reminder notification types are configured in the lower portion of the page (blue box in screenshot above).

CAUTION: Deleting a configured notification de-configures the notification. Until the notification is reconfigured, no notifications of this type will be sent.

Select the checkbox(es) in the far-left column for the applicable reminder type(s) and click the **Delete Reminder Notification(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 selected notification type is now unconfigured on the notification setup page.

My Workspaces ▼ Vivarium **Special Purpose Response Form Notification Setup** ⌕ Back

List of Response Types

Edit	Type	Title	Send E-mail Notification
	Submission Type	Submission Corrections Required	Yes
	Submission Type	Review Response	Yes

List of Submission Correction Reminder Notifications Add a New Reminder Notification

	Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Submission Correction Reminder Notification has been posted.					

List of Review Response Reminder Notifications Add a New Reminder Notification

	Edit	Type	Notification after 7 Days	Title	Send E-mail Notification
No Response Pending Reminder Notification has been posted.					

Notice that the **Edit** icon and **Delete Reminder Notification(s)** button no longer appear.