Animal Resource Center

ARC Standalone Review Board Administration

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Introduction

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

This manual is focused on ARC Review Board Administration.

Institutions utilizing both the IACUC Assistant and ARC modules: refer to the IACUC Assistant – Animal Resource Center Integration Guide for information about proper RBA setup and configuration requirements.

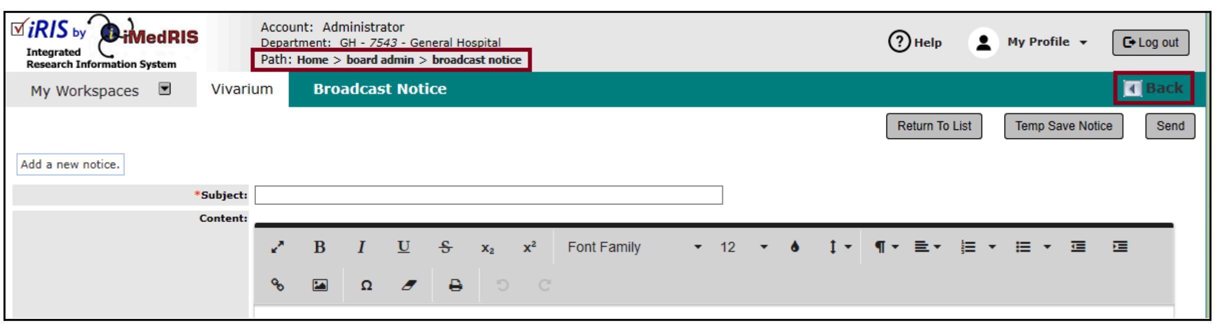
Navigation in iRIS™

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.

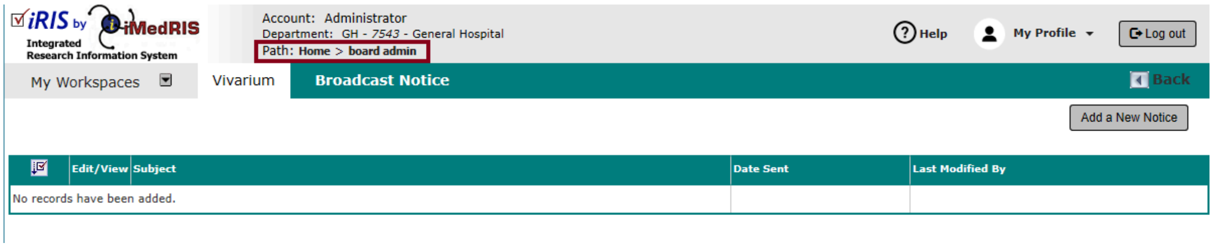
Path Directory Tree

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

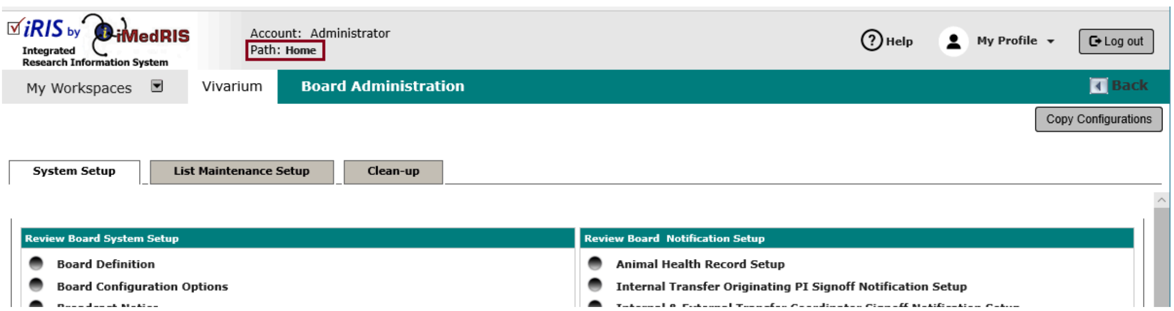
In the example shown the user is viewing the **Broadcast Notice Add a new notice** page. This page is nested three levels beneath the main workspace page, as indicated by the three links available in the **Path** directory tree: **Home**, **board admin** and **broadcast notice**.



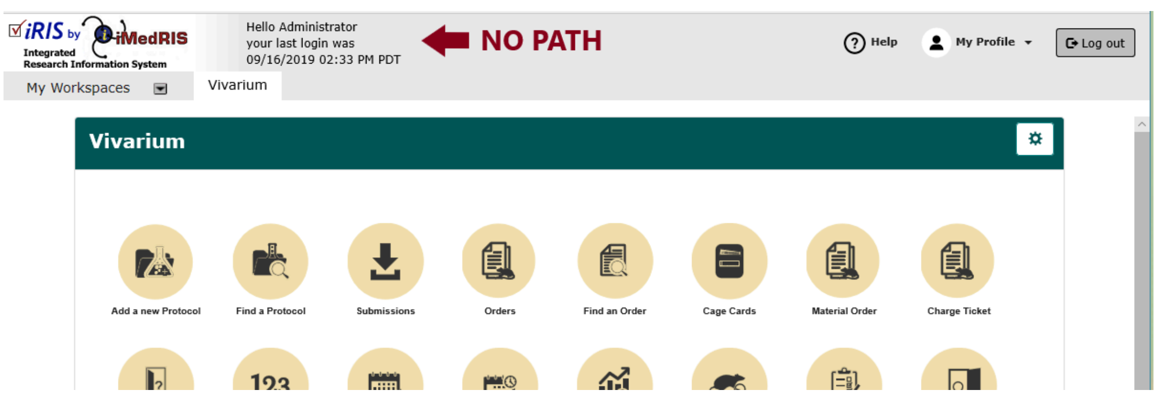
Click on **broadcast notice** in the **Path** to navigate up one level in the directory tree, to the main **Broadcast Notice** page. There are now two levels in the **Path** directory tree: **board admin** and **Home**.



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**.

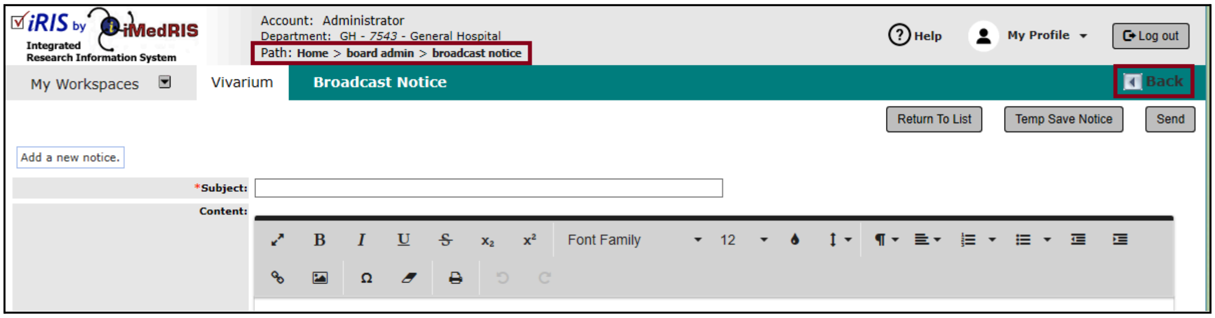


Click on **Home** in the **Path** to navigate up one level in the directory tree, to the main Workspace page. No Path item is displayed here because the user is now at the top-most level of the directory tree.

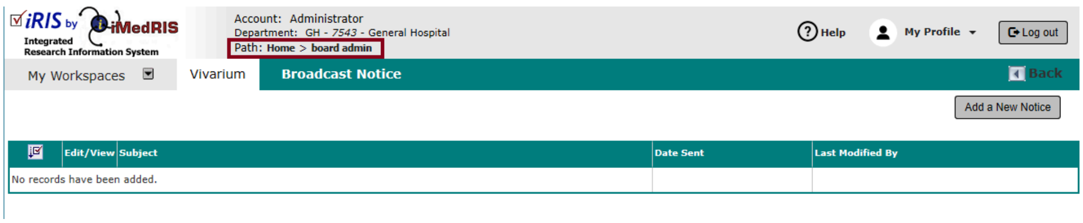


Back Button

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:

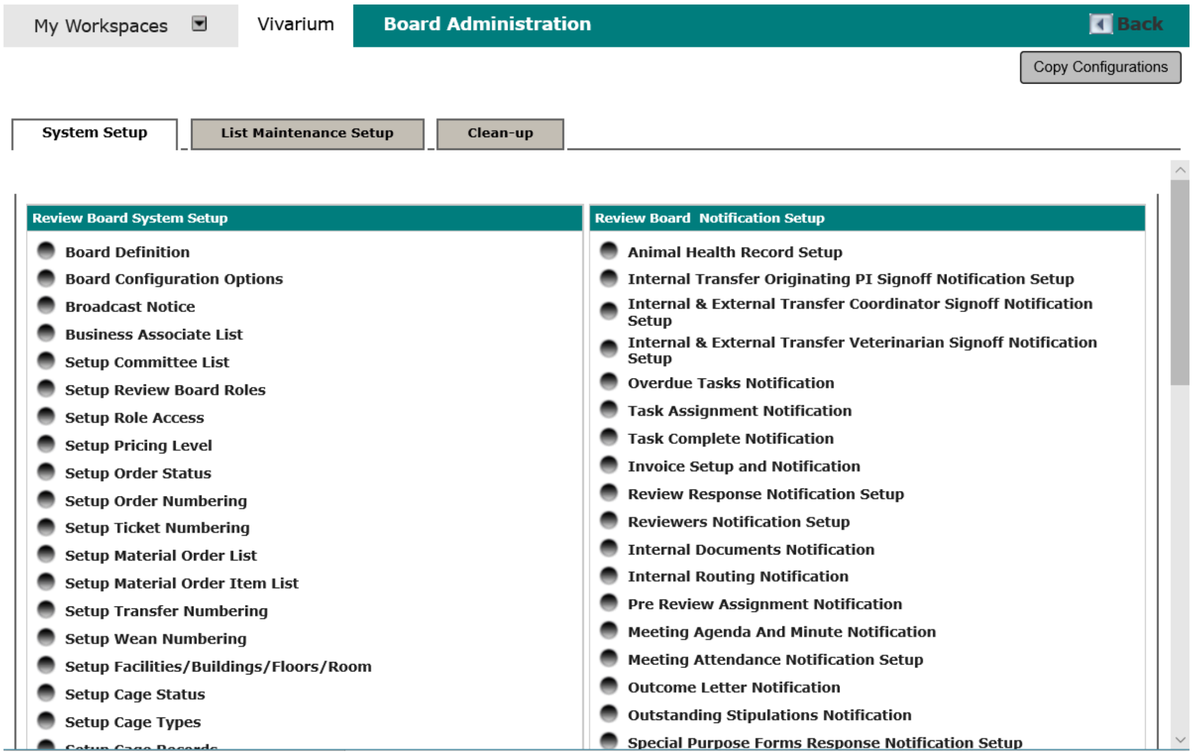


Clicking the **Back** button on the **Broadcast Notice** page returns the user to the Board Administration page, as indicated by the last link in the **Path** directory tree shown in the screenshot above.

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.*

System Setup Tab

System Setup is the first tab on the **Board Administration** page. This section allows review board administrators to manage general ARC module setup, define review board details, set up review board roles and access, create document templates, change labels for data fields within the ARC module, and perform similar module configuration tasks.



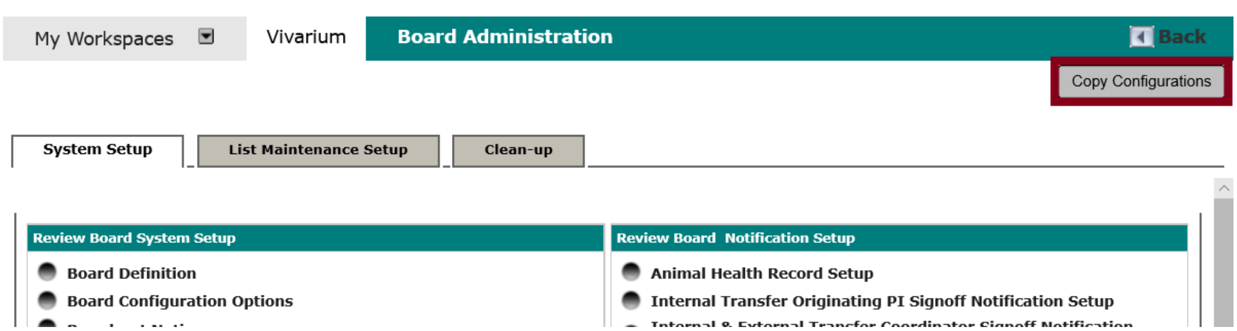
Copy Configurations

Copy Configurations is a tool that can be made available to full System Administrators (as opposed to those assigned to an Administrator role within a specific iRIS™ module) to help with initial setup of iRIS™ when two or more similar review boards are needed. The copy tool allows an iRIS™ system administrator to copy pre-existing, fully configured review board elements into a different, newly created review board.

Copy Configurations should not be used after setup of review boards is complete, nor in a live iRIS™ system. iMedRIS recommends performing a board configuration copy to a destination review board only once.

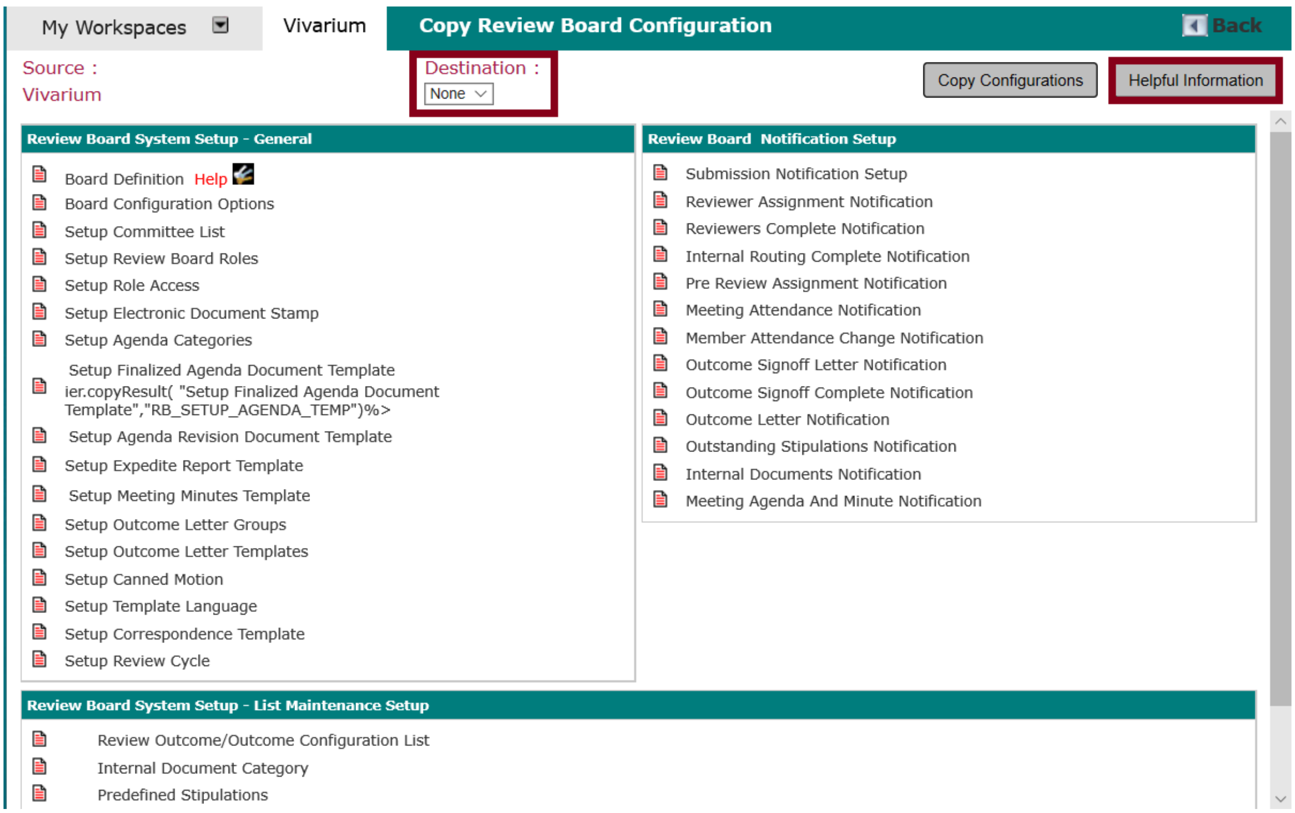
Note that configurations cannot be copied across review boards of different types (IRB to IBC, IRB to ARC, etc.). Within ARC it is only possible to copy configurations across ARC review boards.

Click the **Copy Configurations** button to copy a pre-existing ARC review board configuration to another ARC review board.

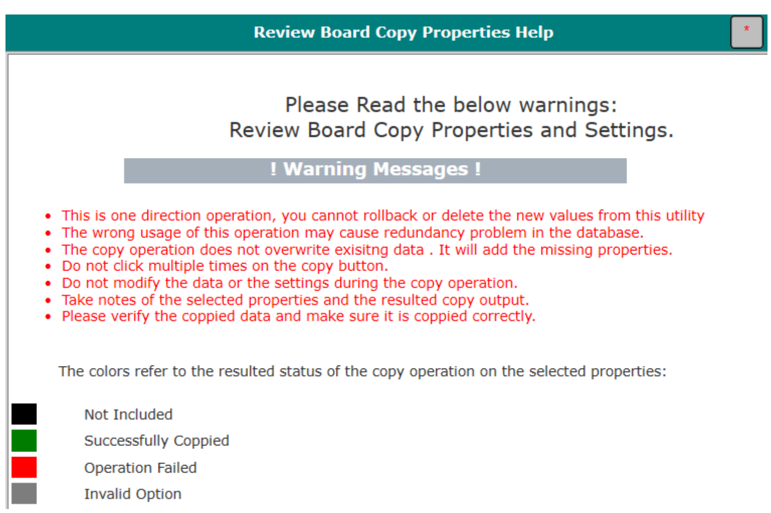


The **Copy Review Board Configuration** page displays. The page contains links to configurations that can be copied to another review board.

Note the **Destination** dropdown list at the top center of the page, and the **Helpful Information** button at right. The **Copy Configurations** button is non-functional until the **Destination** and at least one configuration item are selected (details follow below).

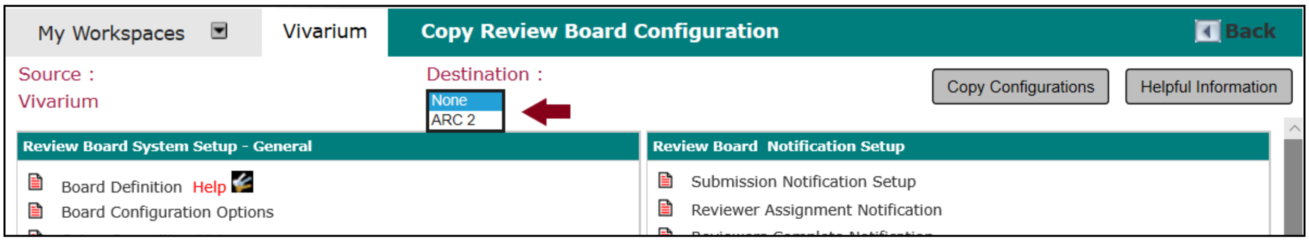


Click the **Helpful Information** button to view a popup containing important information and warnings about copying review board configurations.

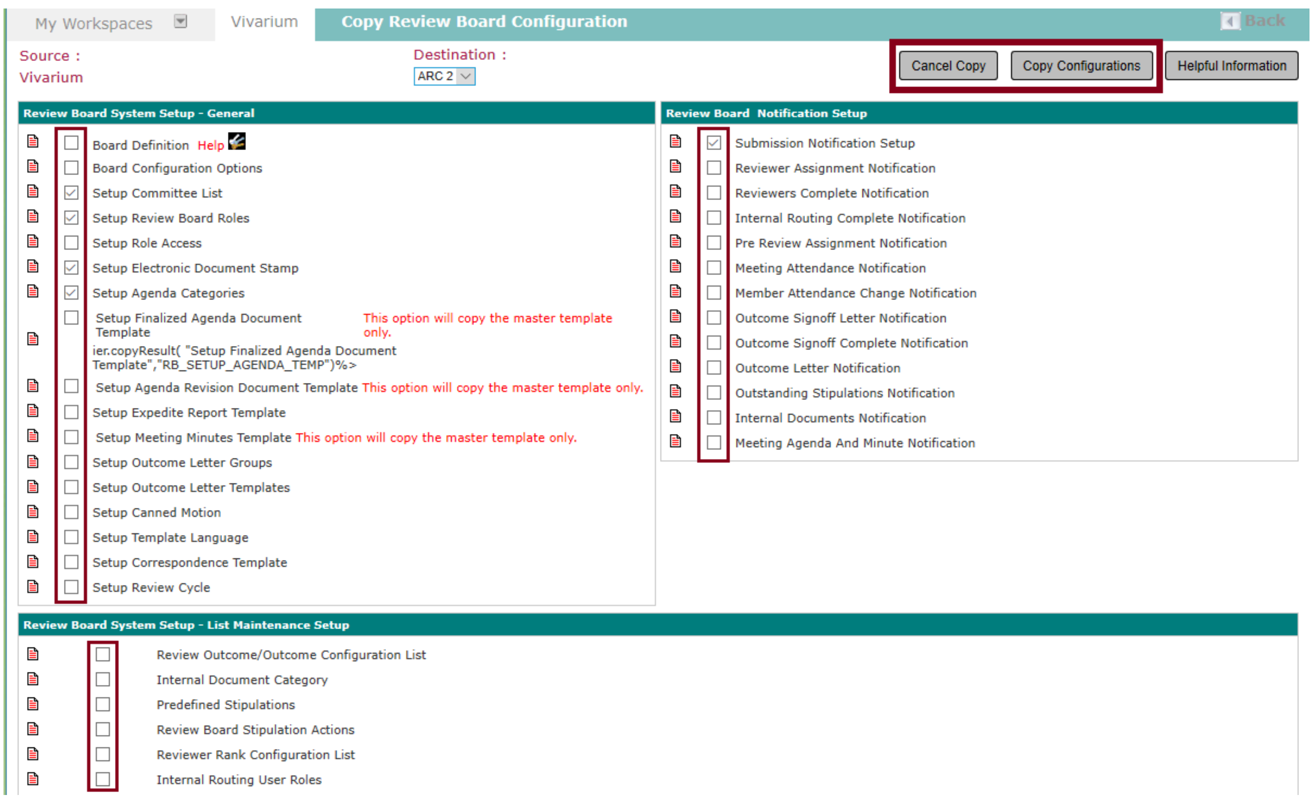


Click the close window button in the upper right corner (marked with a red asterisk) to close the popup.

Back on the **Copy Review Board Configuration** page, select the target review board from the **Destination** dropdown list at the top of the page. The configuration **Source** is shown at the upper left, indicating the review board that is currently active. Only review boards of the same type will populate in the **Destination** dropdown list.



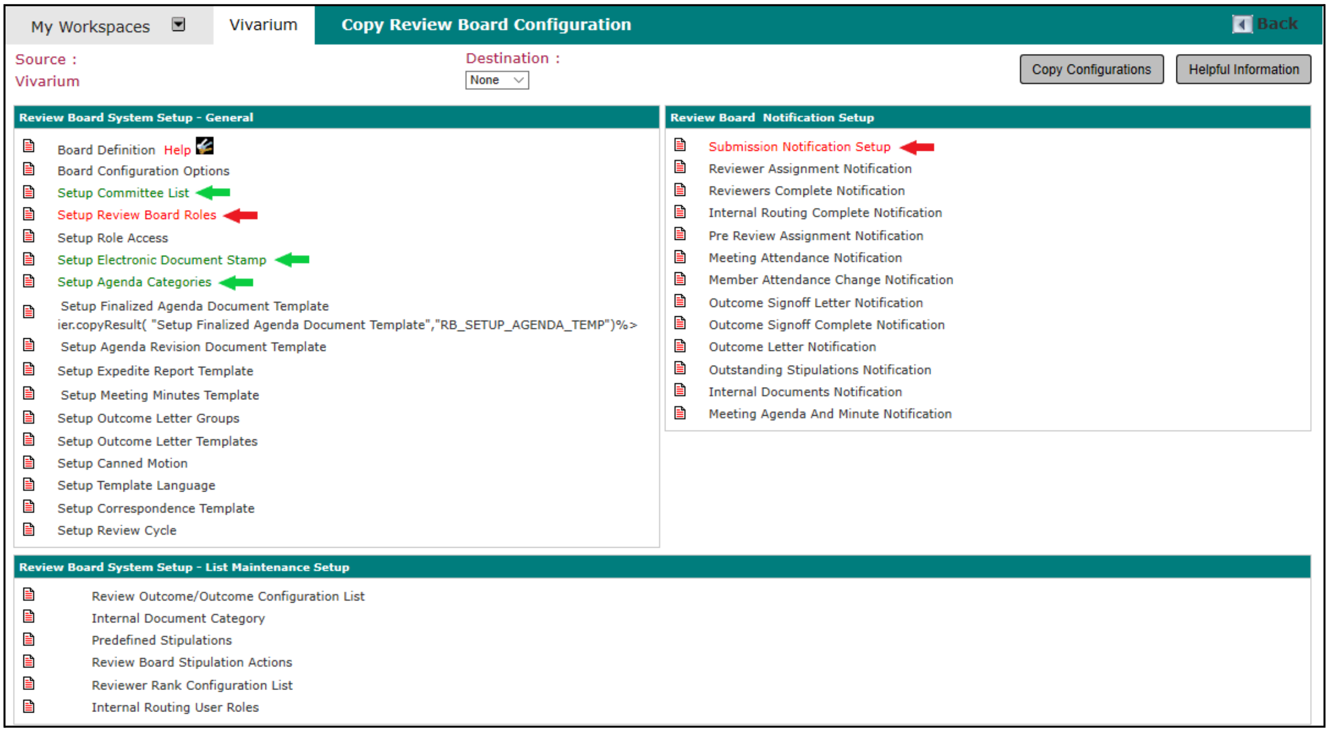
Select boxes for applicable configuration items in the setup lists are now available.



Select the configuration item(s) to be copied to the selected destination by clicking the respective checkbox(es). Click the **Copy Configurations** button to complete the copy process. Click the **Cancel Copy** button to cancel the process without saving changes.

When the **Copy Configurations** button is clicked the copy process completes, and the **Copy Review Board Configuration** page refreshes.

Items where there is no data to copy, or where the corresponding field is not turned on in the destination review board, are not copied to the destination review board.

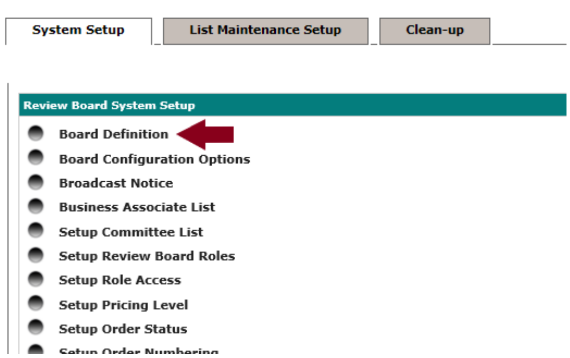


Any items successfully copied are color coded with green text. Items that did not copy successfully are color coded with red text.

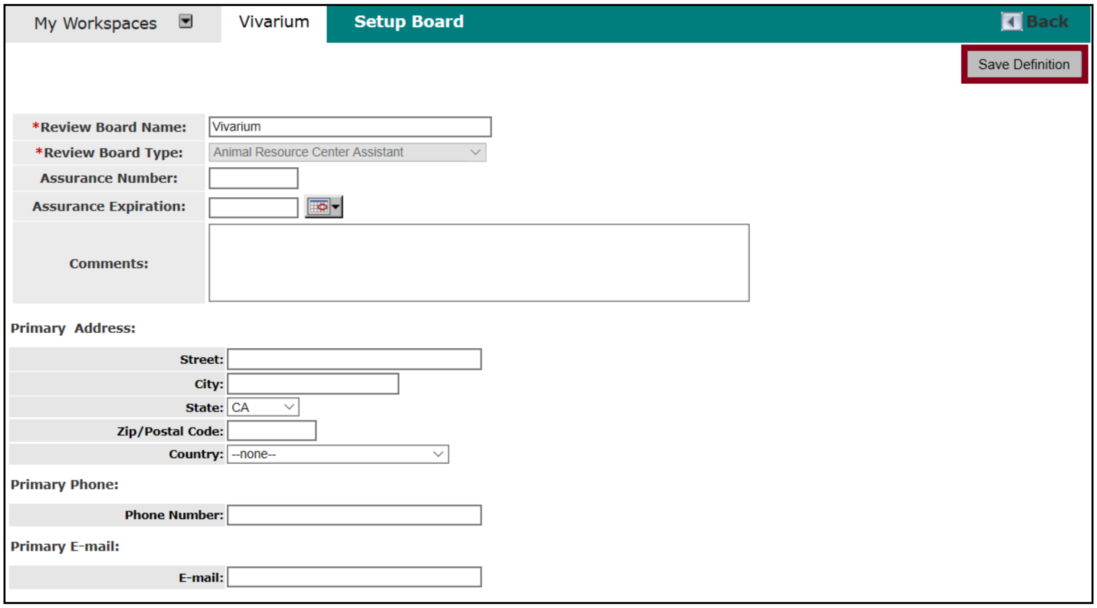
Note: When performing a review board configuration copy from one board to another, fields that were originally pre-populated in the destination board will be overwritten with data copied from the source board.

Board Definition

Review boards are defined, edited and deleted in the Board Administration area of ARC. To define a board, navigate to Animal Resource Center > Review Board Administration and click the **Board Definition** link on the **System Setup** tab.



The **Setup Board** page is opened.



There are two required fields: **Review Board Name** and **Review Board Type**. The **Review Board Type** dropdown list contains predefined board types as specified in the institution's contract with iMedRIS Data Corporation. The dropdown is disabled on this page, as the review board type has already been pre-defined in System Administration.

An Institutional Review Board (IRB) must have any required Assurance registered in order to receive research support from various funding and resource institutions. For example, an institution must have a Federalwide Assurance (FWA) registered in order to receive Health and Human Services (HHS) support for research involving human subjects.

Where applicable, enter the registered **Assurance Number** and **Assurance Expiration** date. If no Assurance is applicable to the board, skip these fields.

Use the **Comments** field to enter additional notes or comments about the board.

In the **Primary Address** section, enter **Street**, **City**, **State**, **Zip/Postal Code** and **Country**. This is the address that will appear on board documents and correspondences that include a board address.

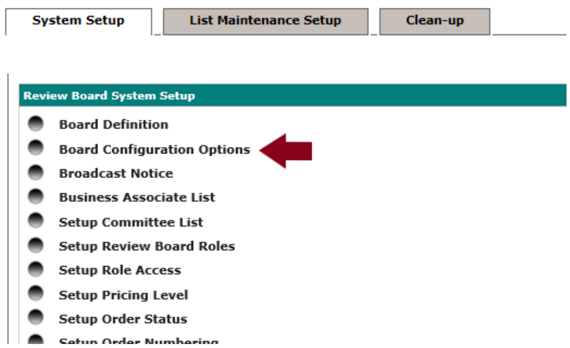
In the **Primary Phone** section, enter the **Phone Number** designated for contacting the board.

In the **Primary E-Mail** section, enter the **E-mail** address designated for contacting the board.

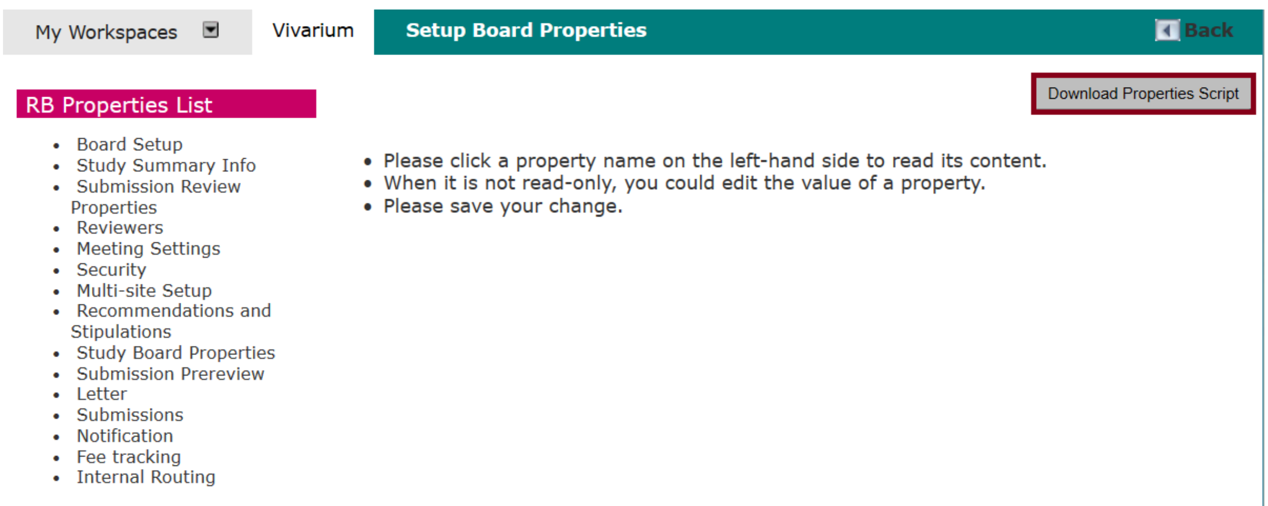
Click the **Save Definition** button at the upper right to save the record.

Board Configuration Options

To set or revise board configuration options, navigate to Animal Resource Center > Review Board Administration and click the **Board Configuration Options** link on the **System Setup** tab.



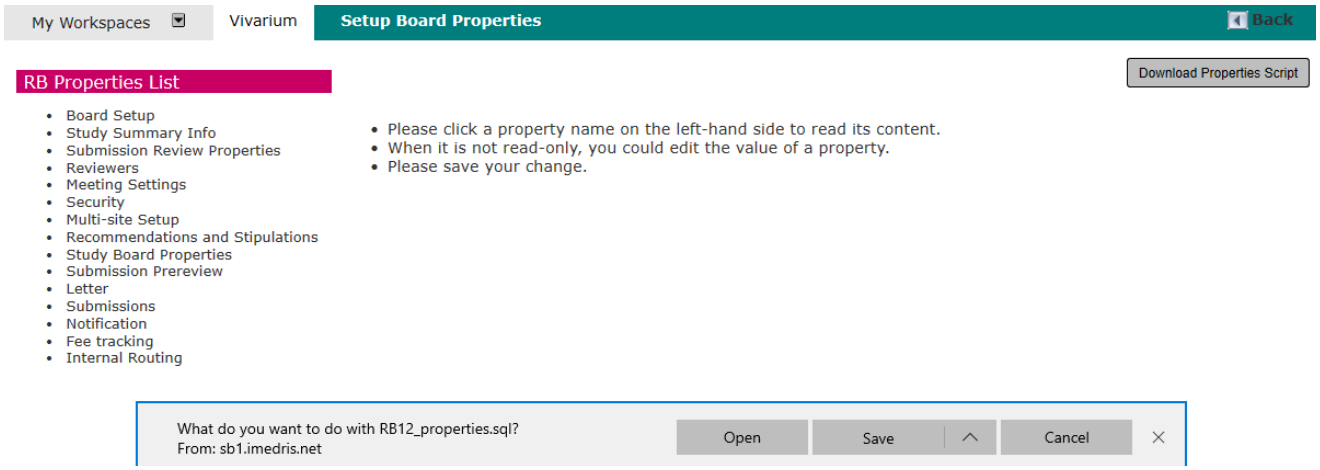
The **Setup Board Properties** page is opened. This page lists properties the administrator can set within the review board module.



It is the System Administrator's responsibility to determine the property settings that will best align with the organization's preferences before making changes.

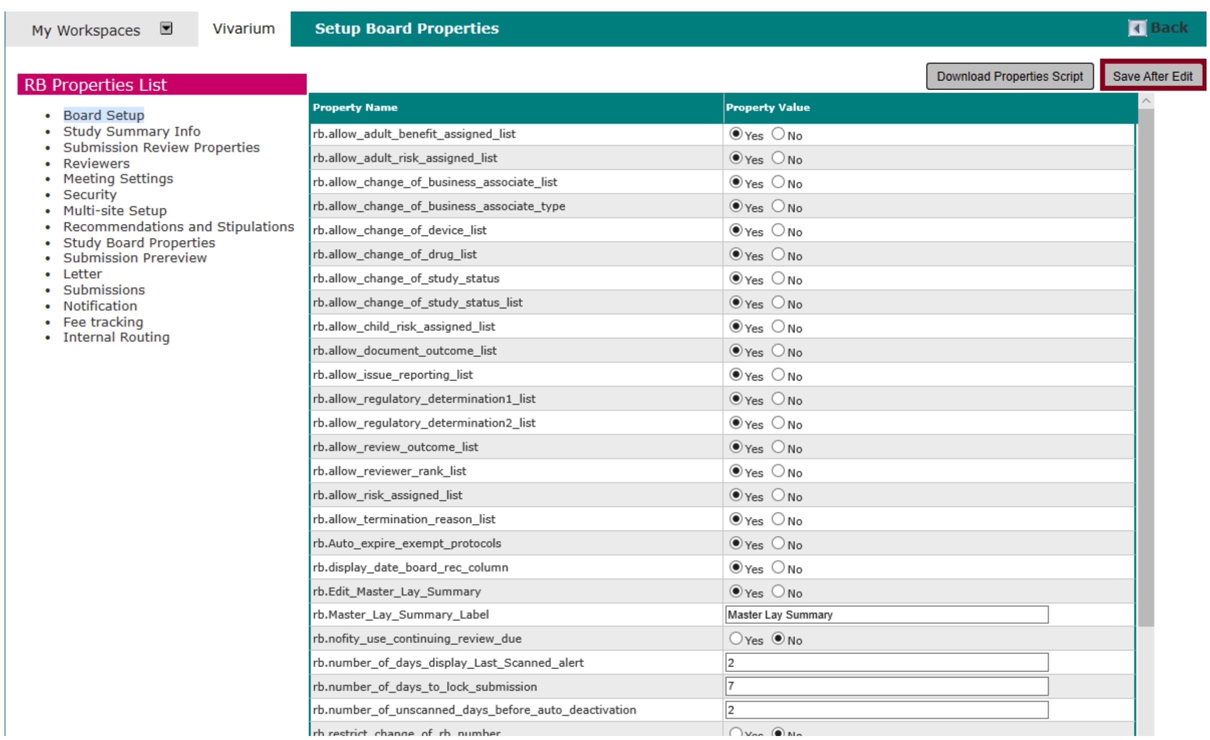
If assistance is needed to ensure optimal settings, discuss intended changes with iMedRIS personnel before making the changes.

Click the **Download Properties Script** button to download a SQL script containing configurations for the review board properties, which can be used to import the configurations into another iRIS™ system.



Click an item in the **RB Properties List** to load an editable panel containing all properties related to that category.

Where available, Yes/No radio buttons turn the property "on" or "off". A property with any **Property Value** other than Yes/No radio buttons is a variable.



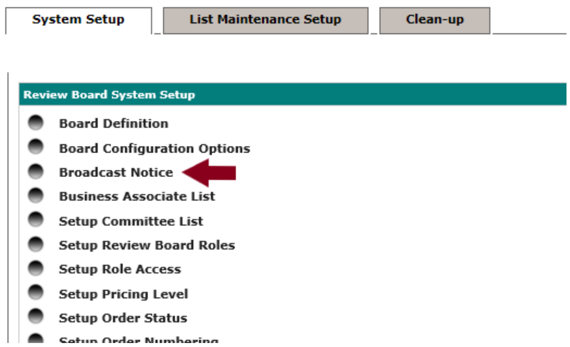
See the Animal Resource Center — Properties manual for more information on each individual property.

Broadcast Notice

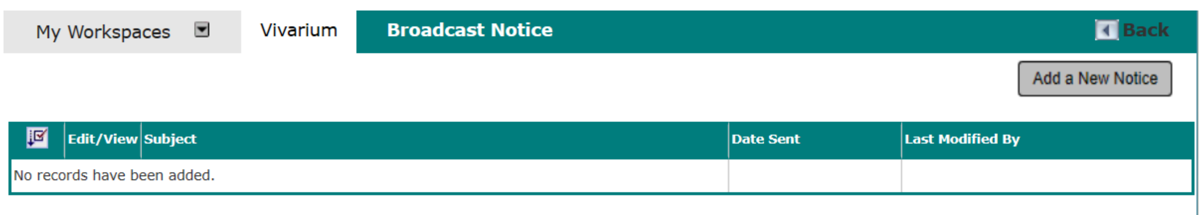
Broadcast Notice allows the system administrator to send an email to review board members and to users on studies associated with the review board. This is a useful tool for sending group alerts and messages.

*Note that the **Broadcast Notice** tool under iRIS™ System Administration—as opposed to System Administration within a module like ARC—can send a message to all users in the iRIS™ system. The System Administrator must be cautious to use the correct **Broadcast Notice** tool for their purposes.*

To access **Broadcast Notice** options, navigate to Animal Resource Center > Review Board Administration and click the **Broadcast Notice** link on the **System Setup** tab.

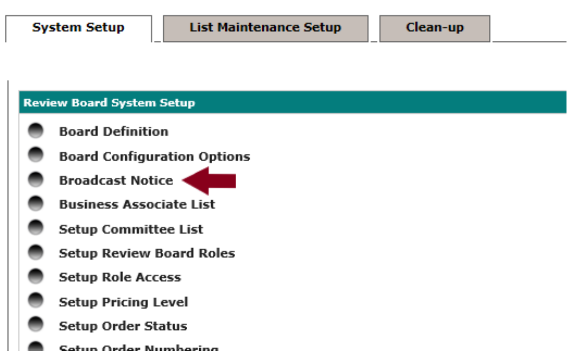


The **Broadcast Notice** page displays any broadcasts previously set up/sent out. The list is empty the first time the page is opened.

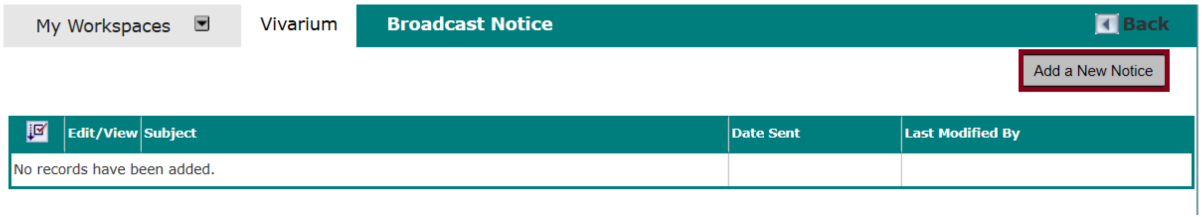


Add a New Notice

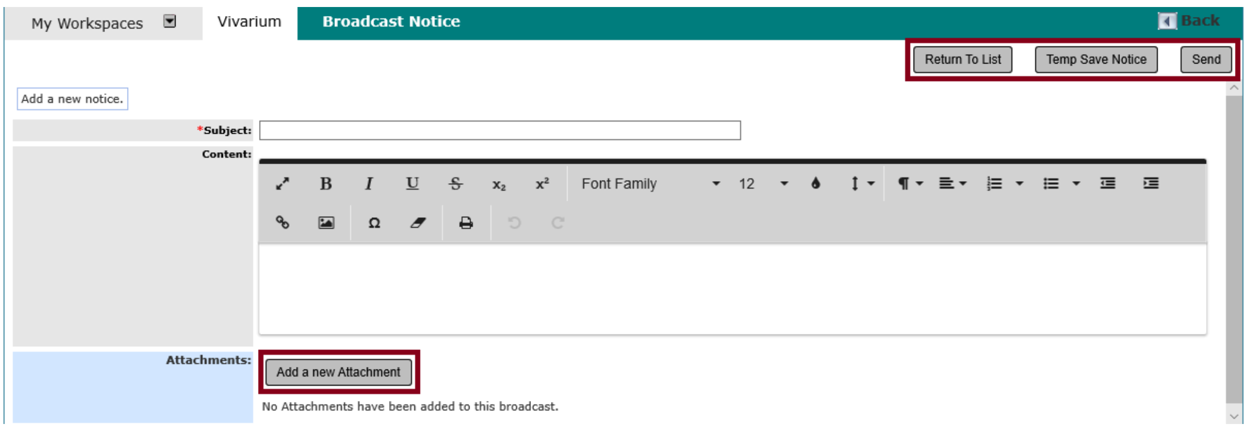
Navigate to Animal Resource Center > Review Board Administration and click the **Broadcast Notice** link on the **System Setup** tab.



The **Broadcast Notice** page displays any broadcasts previously set up/sent out. The list is empty the first time the page is opened.



Click the **Add a New Notice** button to create and send a message. The **Add a new notice** panel opens.



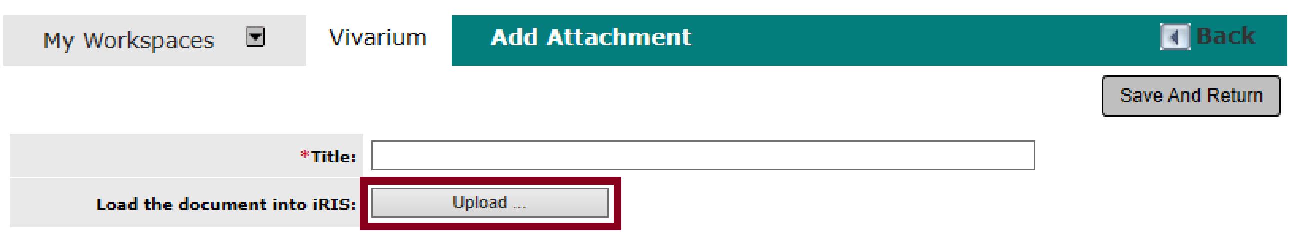
Click the **Return to List** button to cancel and return to the list of broadcast notices.

The **Temp Save Notice** button is used to save a notice draft, explained in greater detail in the Draft Notice subsection of this manual, immediately following the current subsection.

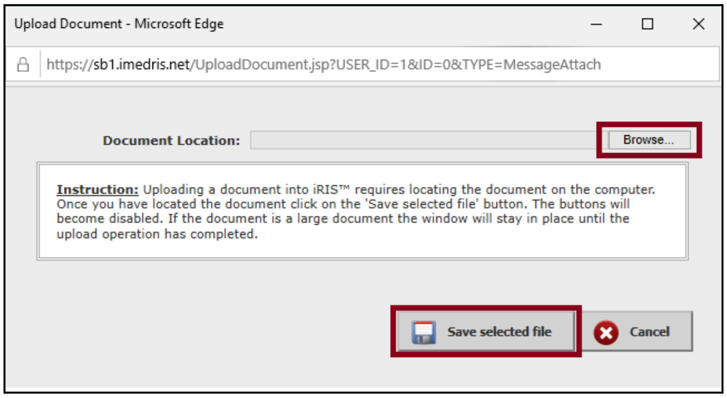
Enter a **Subject** and type, or copy and paste, desired text in the **Content** area. Use the toolbar to format text as desired. Notice that tools for insertion of hyperlinks and images are included.

Click the **Add a new Attachment** button to attach a document file to the notice.

An upload panel opens. Enter the **Title** of the document and click the **Upload** button.



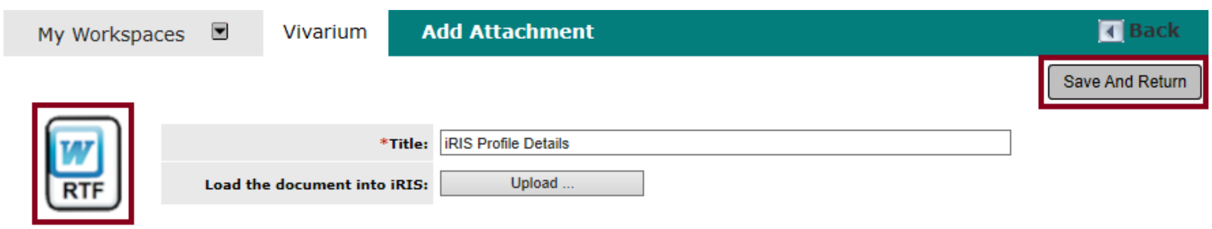
An upload dialog popup window displays.



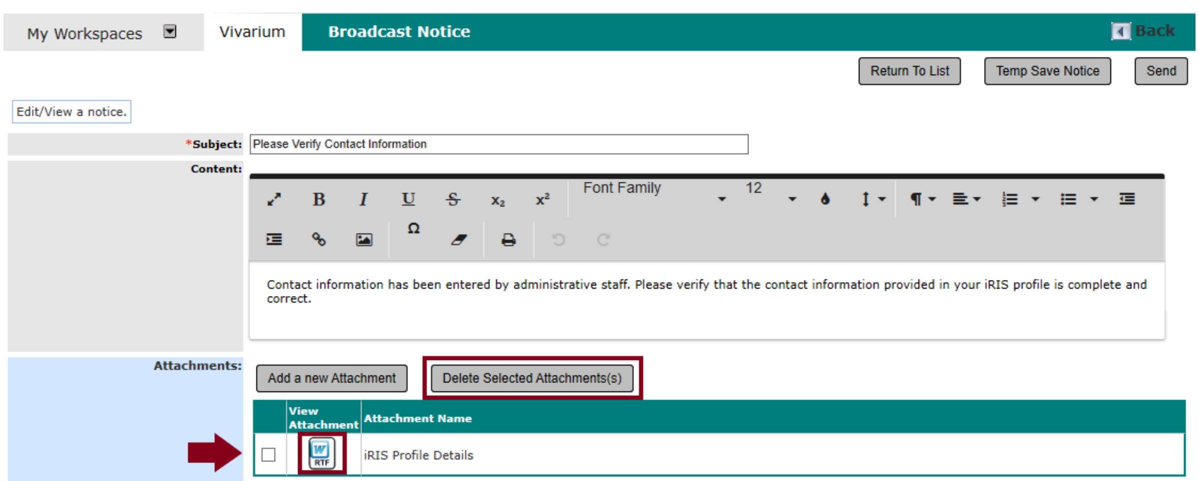
Click the **Cancel** button to close the popup without uploading a document.

Click the **Browse** button to navigate to the document to be uploaded. When the file path is displayed in the **Document Location** field, click the **Save selected file** button to attach it to the notice record.

The **Add Attachment** panel refreshes, displaying an icon for the attachment to the left of the **Title**. Click the **Save and Return** button save the notice and attachment.



The attached document icon displays in a table in the **Attachments** area of the **Edit/View a notice** panel.



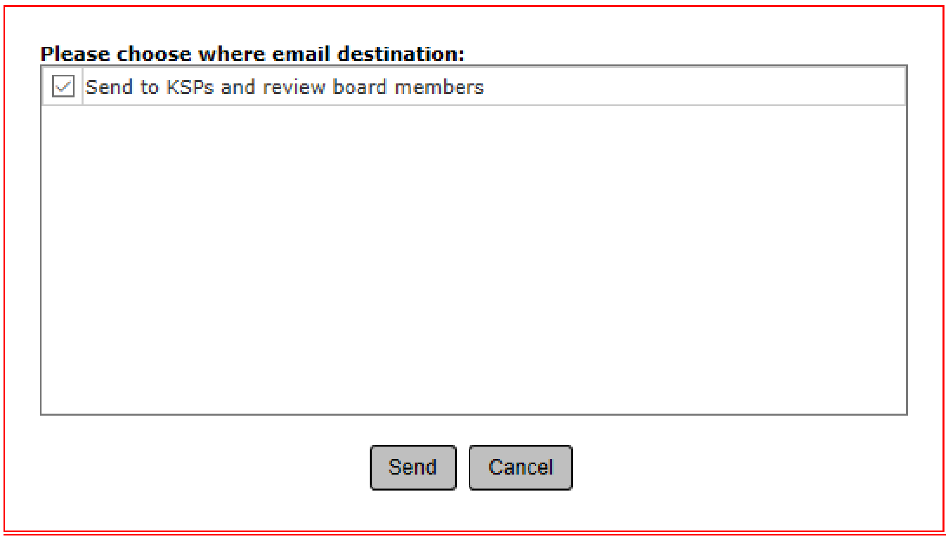
To view an attachment, click its icon.

To remove an attachment, click the select checkbox to the left of the document icon and click the **Delete Selected Attachment(s)** button.

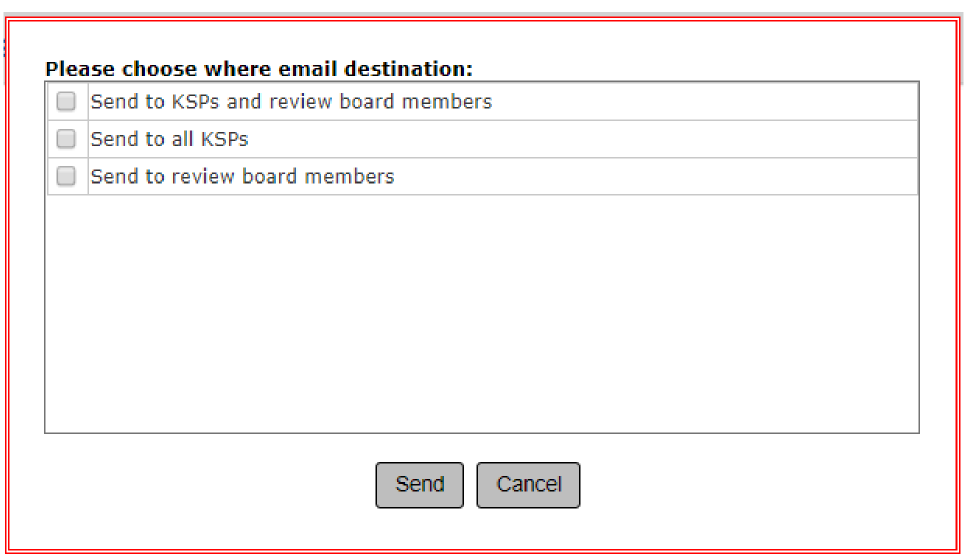
Note that multiple attachments can be added, but users are still subject to institution or email server restrictions on file size for email attachments.

Click the **Send** button at the upper right corner of the **Edit/View a notice** panel to send the notice. A popup email distribution window opens for selection of notice recipients.

Click the **Cancel** button to exit without sending.



Note that **Send to KSPs and review board members** is selected by default when the popup opens. Click the checkbox to deselect that option and unlock the other two options: **Send to all KSPs** and **Send to review board members**.



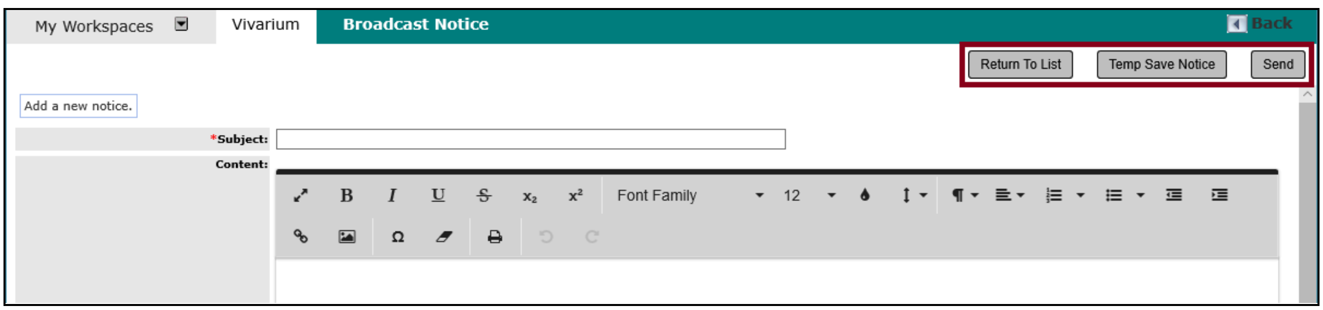
Select the applicable checkbox, then click the popup window **Send** button.

After the notice is sent the **Broadcast Notice** page displays, with the sent broadcast notice added to the list and its **Date Sent** field populated.

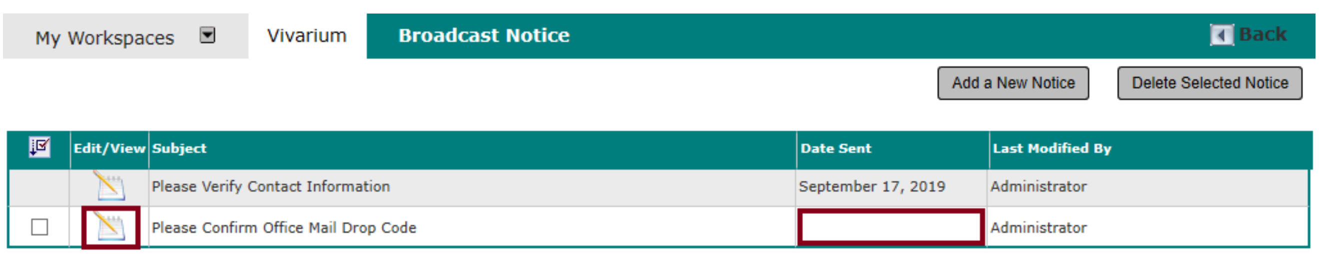
Note that the **Edit/View** icon is still present but the select box at the far left, for notice deletion, is gone. Sent notices can be viewed but cannot be edited or deleted.

Draft Notice

When creating a new notice in the **Add a new notice** panel, it is possible to save the notice as a draft.



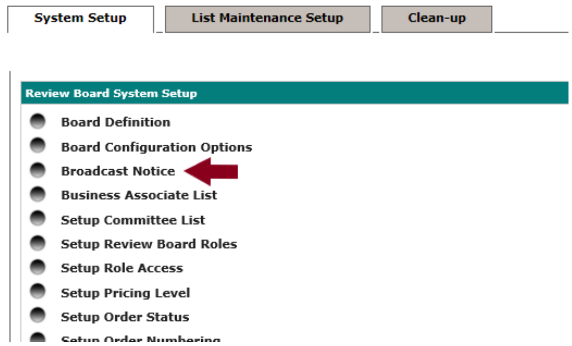
Enter a **Subject** line and desired content, then click the **Temp Save Notice** button to save a draft of the notice and return to the **Broadcast Notice** page. Note that draft notices do not have a **Date Sent** value in the list on the **Broadcast Notice** page.



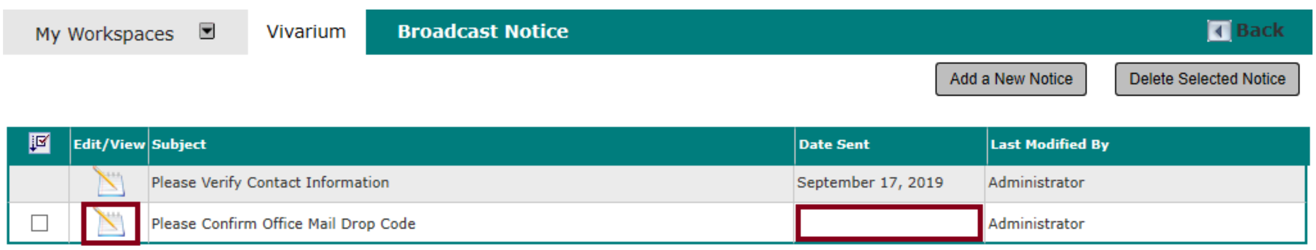
Edit a Broadcast Notice

Draft broadcast notices can be edited (and sent) or deleted. Notices that have been sent cannot be deleted or edited, but they can be viewed.

Navigate to Animal Resource Center > Review Board Administration and click the **Broadcast Notice** link on the **System Setup** tab.



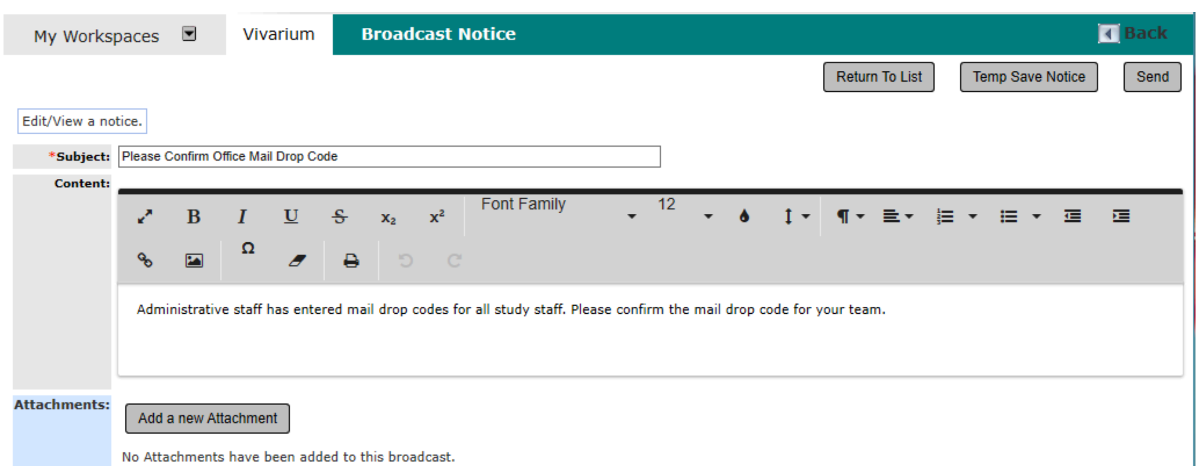
The **Broadcast Notice** page displays any broadcasts previously set up/sent out.



Draft notices do not have a value in the **Date Sent** column, which is how they can be easily identified in the **Broadcast Notice** list.

Click the icon in **Edit/View** column to the left of a draft title to open the draft and resume work on it.

The title of the Add a new notice panel changes to **Edit/View a notice** when a draft is opened.

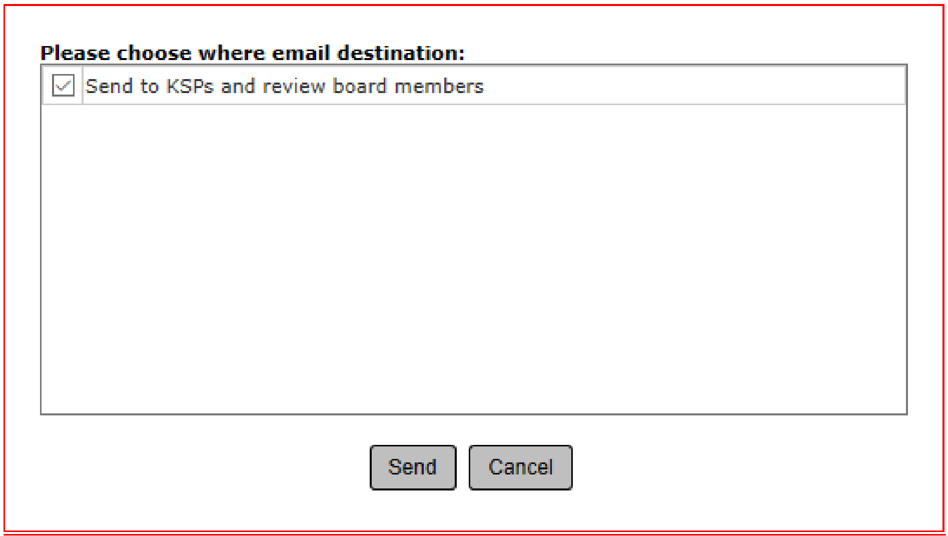


Click the **Return to List** button to return to the Broadcast Notice list page without saving changes.

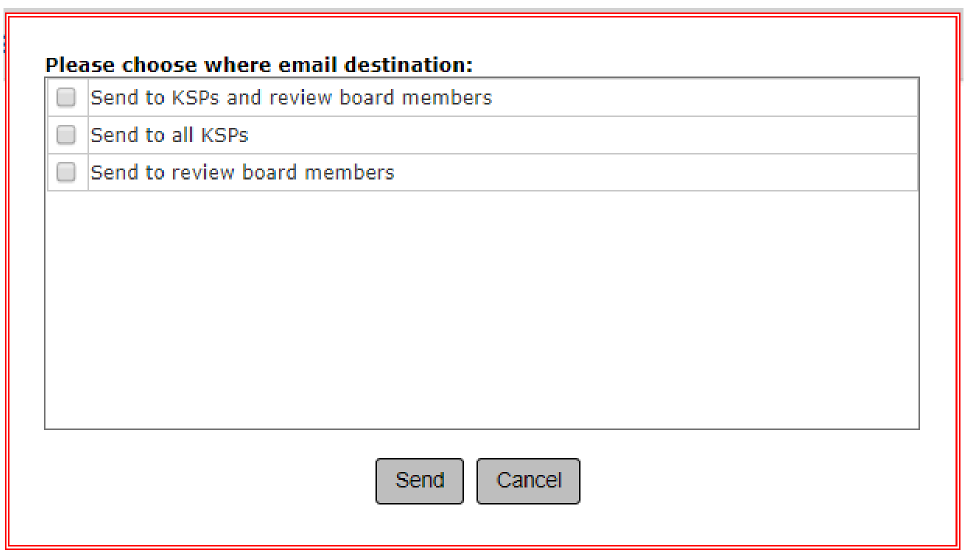
Click the **Temp Save Notice** button to save changes and keep the notice as a draft.

Click the **Send** button to save changes and send the notice.

A popup email distribution window opens for selection of notice recipients. Click **Cancel** to exit without sending.



Note that **Send to KSPs and review board members** is selected by default when the popup opens. Click the checkbox to deselect that option and unlock the other two options: **Send to all KSPs** and **Send to review board members**.



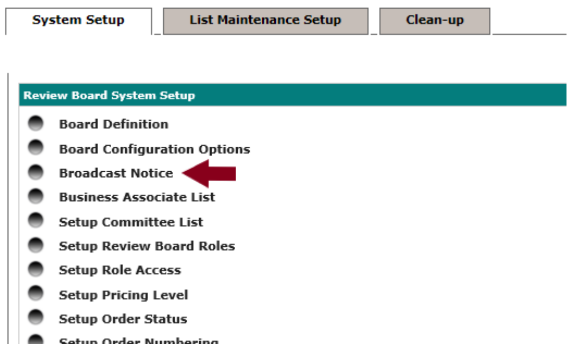
Select the applicable checkbox, then click the popup window **Send** button.

After the notice is sent the **Broadcast Notice** page displays, with the **Date Sent** field populated for the sent notice. Recall that sent notices cannot be edited or deleted.

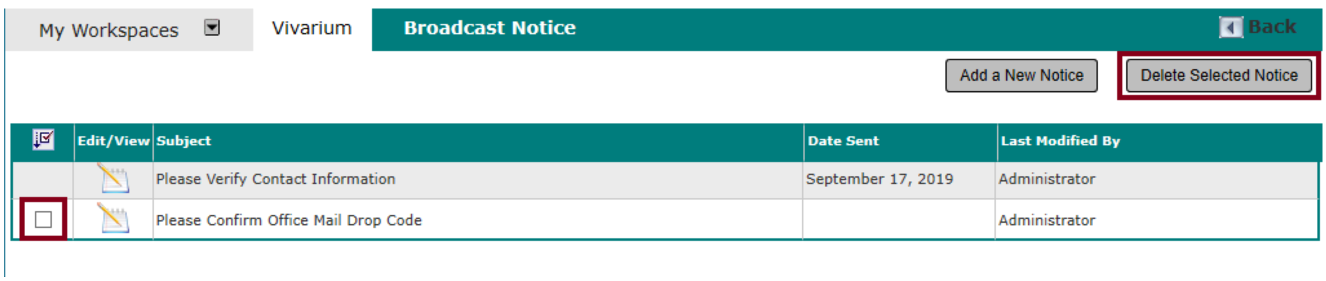
Delete a Broadcast Notice

Draft broadcast notices can be edited (and sent) or deleted. Notices that have been sent cannot be deleted.

Navigate to Animal Resource Center > Review Board Administration and click the **Broadcast Notice** link on the **System Setup** tab.

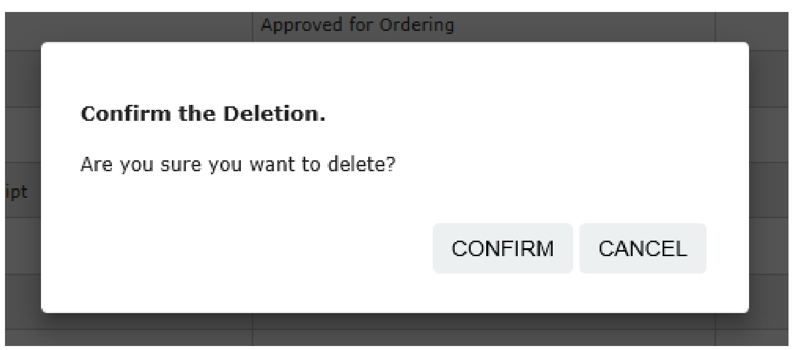


The **Broadcast Notice** page displays any broadcasts previously set up/sent out. Note that the **Date Sent** column is blank for draft notices listed here.



To delete a notice, select the checkbox at far left for the applicable notice and click the **Delete Selected Notice** button.

A confirmation popup window displays.



Click **CONFIRM** to delete the notice and return to the **Broadcast Notice** page.

Click **CANCEL** to return to the **Broadcast Notice** page without deleting the notice.

Business Associate List

The Business Associate List link is used to access system functions related to business associates. In this context, a business associate is an institution or business which interacts with the institution where iRIS™ is in use.

Within the iRIS™ system, business associate entities can be added as a study sponsor, vendor or subrecipient, or as a third party in a conflict of interest.

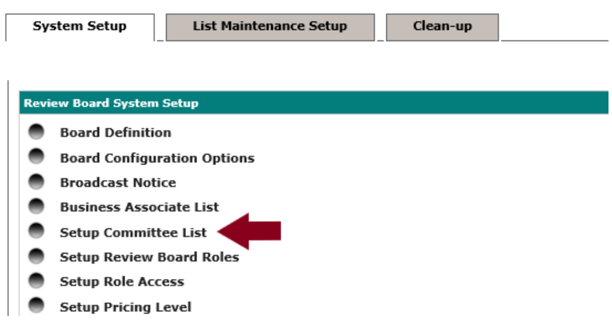
For more information about business associate list management activities, see the Animal Resource Center — Business Associate List manual.

Setup Committee List

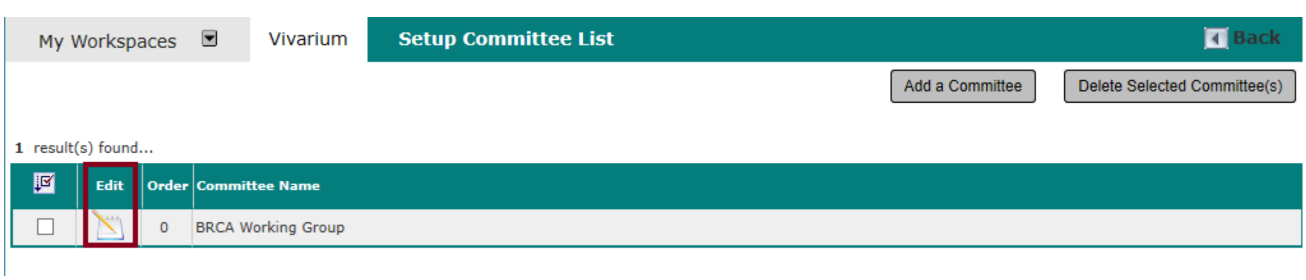
The **Setup Committee List** page is where current review board committees can be viewed, edited or deleted, and new committees added.

Edit Committee

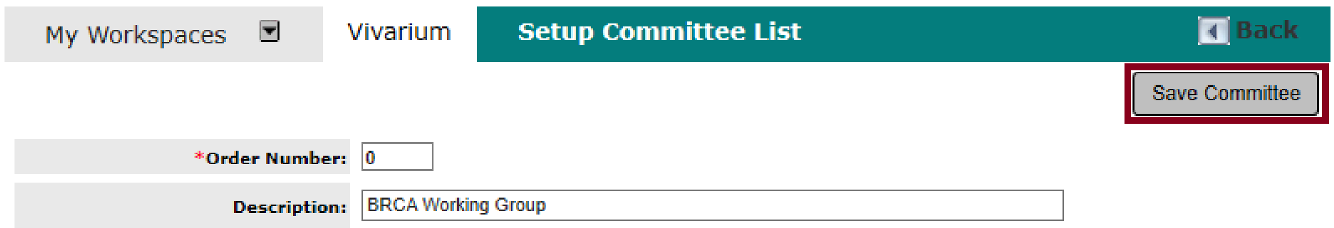
Navigate to Animal Resource Center > Review Board Administration > System Setup tab and click the **Setup Committee List** link.



The **Setup Committee List** page is opened. Committees currently assigned to the ARC review board are listed here. Click the icon in the **Edit** column for the applicable committee.



An edit panel opens.



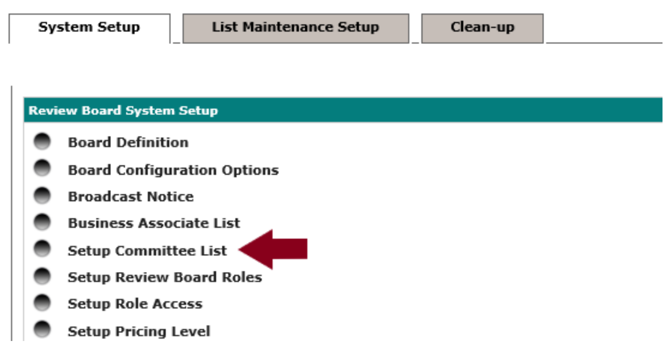
The **Order Number** defines routing priority order for the committee. Routing priority goes in ascending order, beginning with zero. If there is only one committee defined its **Order Number** will always be zero.

The **Description** is the committee name.

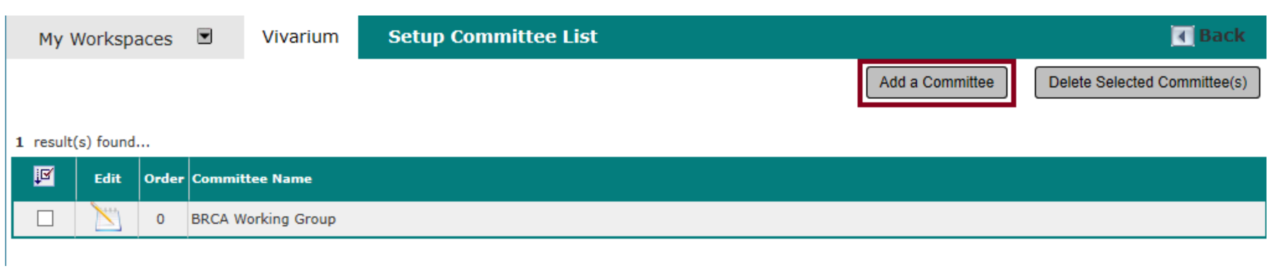
When changes are complete click the **Save Committee** button to save changes and close the edit panel.

Add Committee

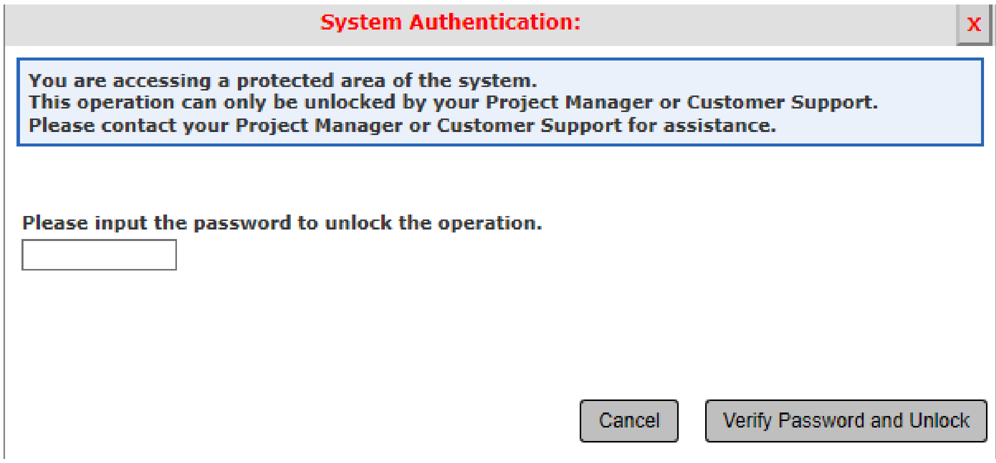
Navigate to Animal Resource Center > Review Board Administration > System Setup tab and click the **Setup Committee List** link.



The **Setup Committee List** page is opened. Click the **Add a Committee** button.

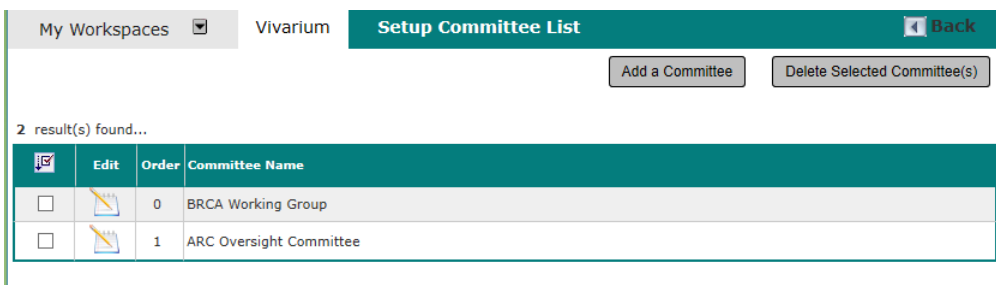


A **System Authentication** popup displays, warning that only iMedRIS Project Managers and Customer Support personnel have the necessary rights to add new review board committees.

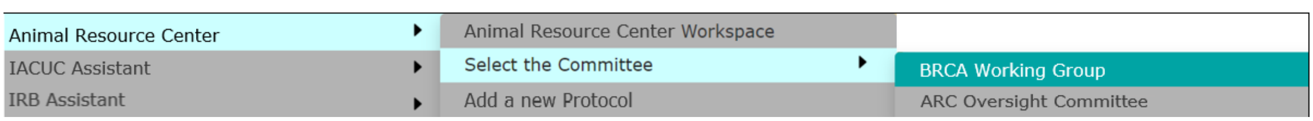


This area is locked because there are costs to the institution for each review board and committee defined in their iRIS™ system.

When an iMedRIS Project Manager or Customer Support representative adds a new committee, it is added to the **Setup Committee List** page.

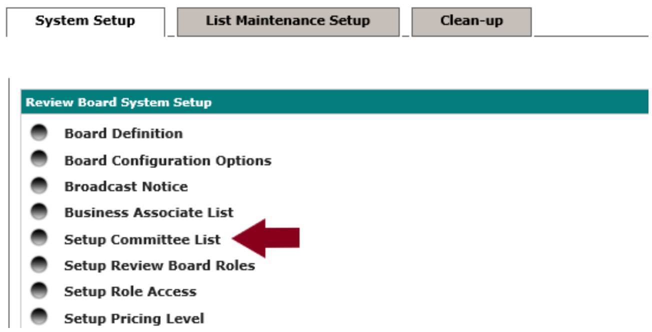


User accounts assigned to more than one review board committee will have a slightly modified main menu, enabling them to select the applicable committee for various tasks.

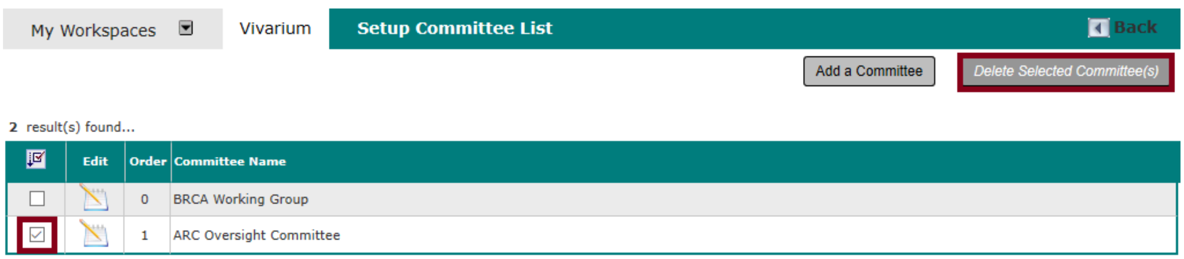


Delete Committee

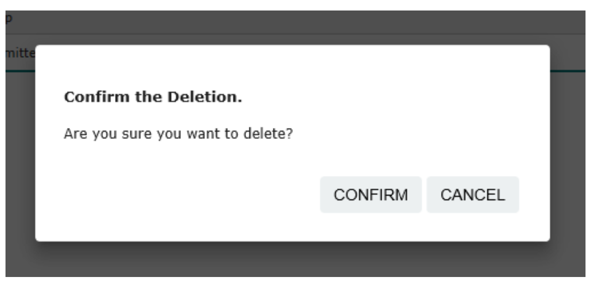
Navigate to Animal Resource Center > Review Board Administration > System Setup tab and click the **Setup Committee List** link.



The **Setup Committee List** page is opened. Select the checkbox for the applicable committee(s) and click the **Delete Selected Committee(s)** button.



A confirmation popup displays.



Click the **CANCEL** button to return to the **Setup Committee List** page without deleting the selected committee(s).

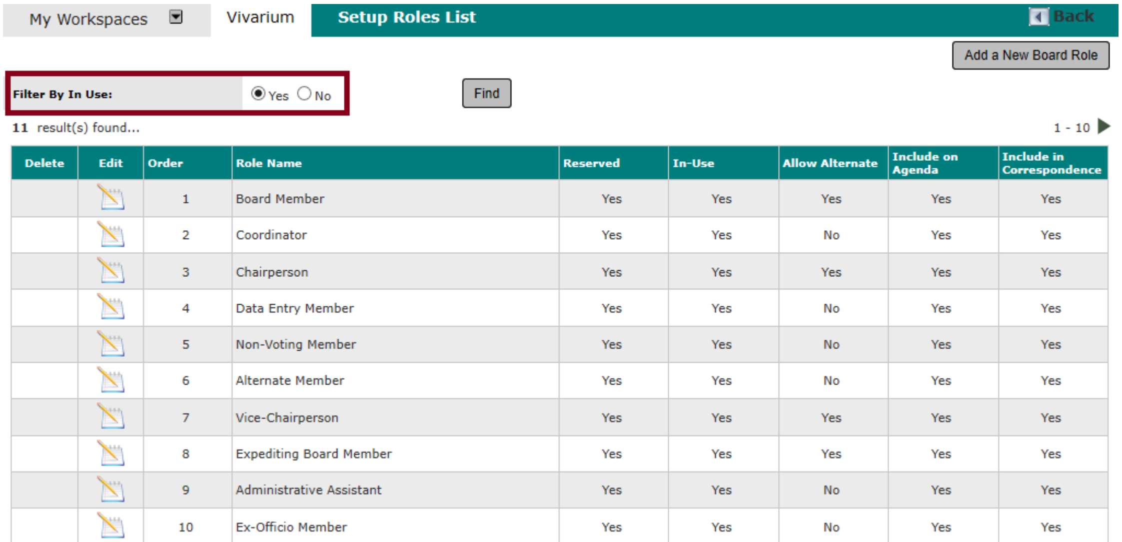
Click the **CONFIRM** button to confirm the deletion and return to the **Setup Committee List** page.

Note: caution must be exercised when deleting committees, as deleting a committee with review tasks assigned to it will disrupt and potentially orphan those tasks.

Also recall that review board committees can only be added by designated iMedRIS personnel, so if a needed committee is deleted in error there may be some delay in recreating it.

Setup Review Board Roles

The **Setup Roles List** page is where review board member roles can be viewed, edited or deleted, and new roles added. Each member role can be customized to allow for inclusion or exclusion on agenda and correspondence routing, as well as to allow for or prohibit designation of an alternate iRIS™ user to fulfill the duties of the role when the assigned user is unavailable.


My Workspaces Vivarium **Setup Roles List** Back

Add a New Board Role

Filter By In Use: Yes No Find

11 result(s) found... 1 - 10

Delete	Edit	Order	Role Name	Reserved	In-Use	Allow Alternate	Include on Agenda	Include in Correspondence
		1	Board Member	Yes	Yes	Yes	Yes	Yes
		2	Coordinator	Yes	Yes	No	Yes	Yes
		3	Chairperson	Yes	Yes	Yes	Yes	Yes
		4	Data Entry Member	Yes	Yes	No	Yes	Yes
		5	Non-Voting Member	Yes	Yes	No	Yes	Yes
		6	Alternate Member	Yes	Yes	No	Yes	Yes
		7	Vice-Chairperson	Yes	Yes	Yes	Yes	Yes
		8	Expediting Board Member	Yes	Yes	Yes	Yes	Yes
		9	Administrative Assistant	Yes	Yes	No	Yes	Yes
		10	Ex-Officio Member	Yes	Yes	No	Yes	Yes

Filter By In Use is set to "Yes" by default. Select "No" here to display roles that are not currently in use. *Note that this is a toggled setting, it is not possible to view both in use and not in use roles in a single list.*

Columns in the **Setup Roles List** table are:

— **Delete**: where it is possible to delete a role, click the icon in this column to delete a role record; note that the icon does not appear for roles that cannot be deleted

— **Edit**: click the icon in this column to open a role record for editing

— **Order**: priority number of the role for review, signoff and correspondence routing; note that priority numbers are ranked in ascending order from highest to lowest, beginning with one (1) as the highest priority number

— **Role Name**: name assigned to the role; note that role names can be modified by the institution

— **Reserved**: a "Yes" in this column indicates the role is **Reserved** and cannot be deleted; a "No" here indicates the role is not **Reserved** and *can* be deleted, provided it is not currently in use (see next item, below)

— **In-Use**: a "Yes" in this column indicates the role is currently in use on one or more studies / protocols and cannot be deleted; a "No" here indicates the role is not currently in use and can be deleted

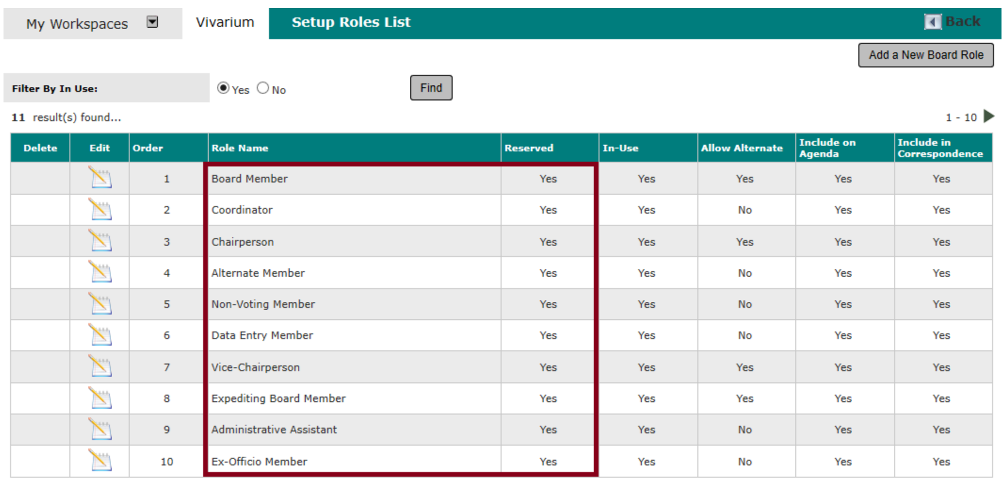
— **Allow Alternate**: a "Yes" in this column indicates an alternate person who is included in the Alternate For list under Animal Resource Center > User Management > Grant User Access &

Define Roles can be selected to fulfill the meeting duties of this role when the primary assignee is unavailable; a “No” here indicates no alternate can be specified for the role

— **Include on Agenda**: a “Yes” in this column indicates users assigned to the role are selectable in the list of Attendees for a meeting date; where the flag is set to “No” users assigned to the role do not display in the meeting Attendees list for a meeting date and are not included in notifications related to the meeting

— **Include in Correspondence**: a “Yes” in this column indicates persons assigned to this role is/are to be included on the correspondence routing list; a “No” here indicates persons assigned to this role is/are not included on the correspondence routing list

As shown below, ten **Reserved** review board roles are predefined by default.


My Workspaces | Vivarium | Setup Roles List | Back

Add a New Board Role

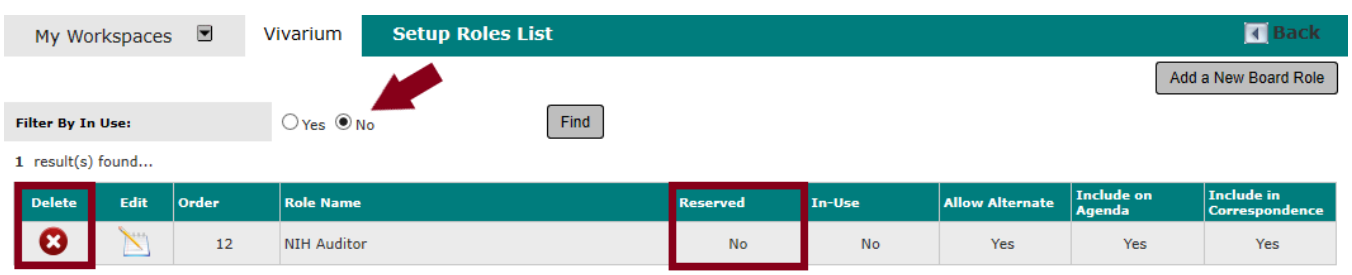
Filter By In Use: (•) Yes ( ) No [Find]

11 result(s) found... 1 - 10

Delete	Edit	Order	Role Name	Reserved	In-Use	Allow Alternate	Include on Agenda	Include in Correspondence
		1	Board Member	Yes	Yes	Yes	Yes	Yes
		2	Coordinator	Yes	Yes	No	Yes	Yes
		3	Chairperson	Yes	Yes	Yes	Yes	Yes
		4	Alternate Member	Yes	Yes	No	Yes	Yes
		5	Non-Voting Member	Yes	Yes	No	Yes	Yes
		6	Data Entry Member	Yes	Yes	No	Yes	Yes
		7	Vice-Chairperson	Yes	Yes	Yes	Yes	Yes
		8	Expediting Board Member	Yes	Yes	Yes	Yes	Yes
		9	Administrative Assistant	Yes	Yes	No	Yes	Yes
		10	Ex-Officio Member	Yes	Yes	No	Yes	Yes

Reserved roles are always designated as **In-Use** regardless of whether the applicable role is currently assigned to any studies/protocols.

In the example below, **Filter By In Use** is toggled to “No” to limit the list to **Role**s not currently in use. Notice that the role is not **Reserved**, as indicated by a “No” in that column, and a **Delete** icon is provided for the role.


My Workspaces | Vivarium | Setup Roles List | Back

Add a New Board Role

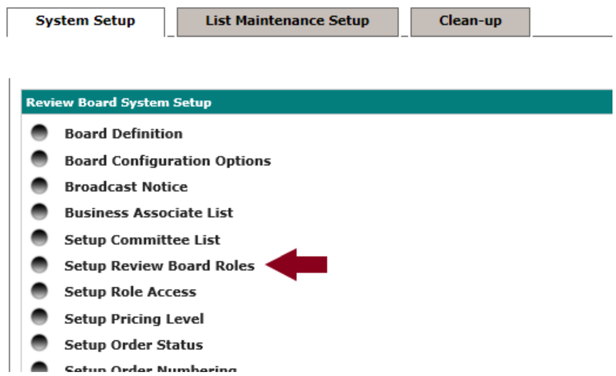
Filter By In Use: ( ) Yes (•) No [Find]

1 result(s) found...

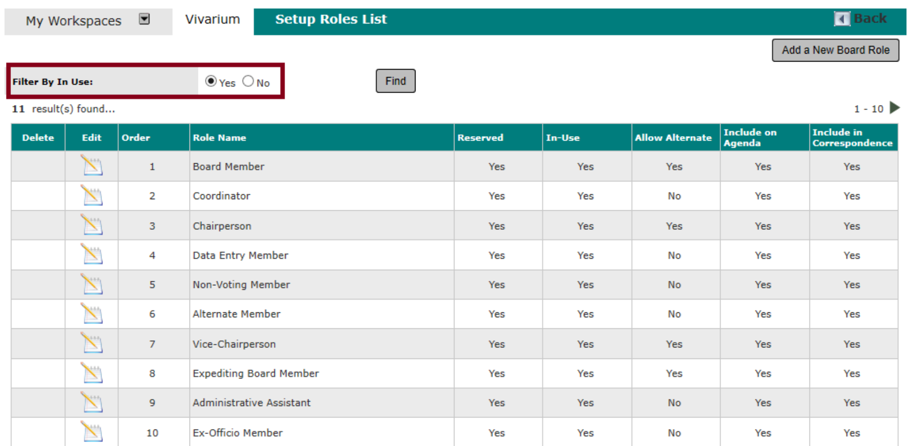
Delete	Edit	Order	Role Name	Reserved	In-Use	Allow Alternate	Include on Agenda	Include in Correspondence
		12	NIH Auditor	No	No	Yes	Yes	Yes

Edit Board Role

Navigate to Animal Resource Center > Review Board Administration > System Setup tab and click the **Setup Review Board Roles** link.



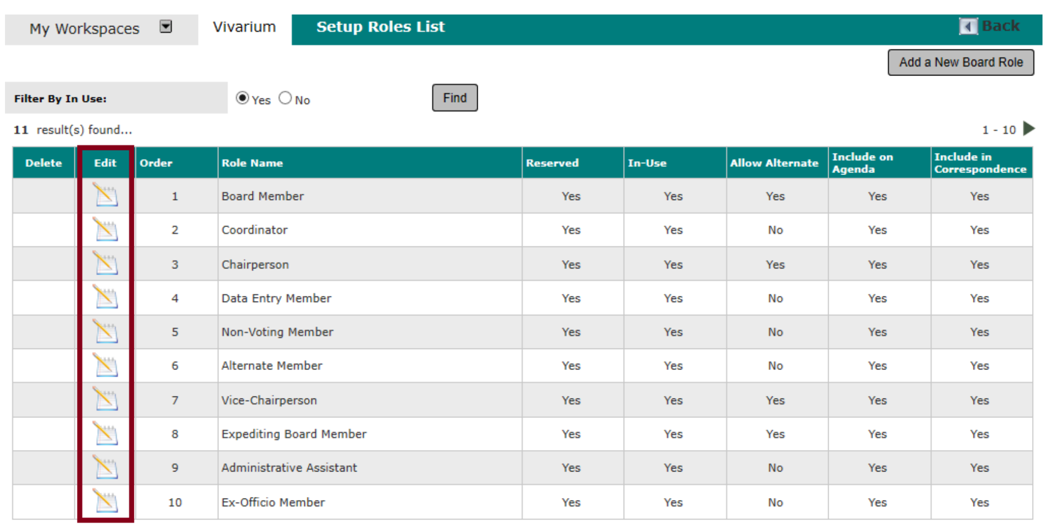
The **Setup Roles List** page is opened.



Delete	Edit	Order	Role Name	Reserved	In-Use	Allow Alternate	Include on Agenda	Include in Correspondence
		1	Board Member	Yes	Yes	Yes	Yes	Yes
		2	Coordinator	Yes	Yes	No	Yes	Yes
		3	Chairperson	Yes	Yes	Yes	Yes	Yes
		4	Data Entry Member	Yes	Yes	No	Yes	Yes
		5	Non-Voting Member	Yes	Yes	No	Yes	Yes
		6	Alternate Member	Yes	Yes	No	Yes	Yes
		7	Vice-Chairperson	Yes	Yes	Yes	Yes	Yes
		8	Expediting Board Member	Yes	Yes	Yes	Yes	Yes
		9	Administrative Assistant	Yes	Yes	No	Yes	Yes
		10	Ex-Officio Member	Yes	Yes	No	Yes	Yes

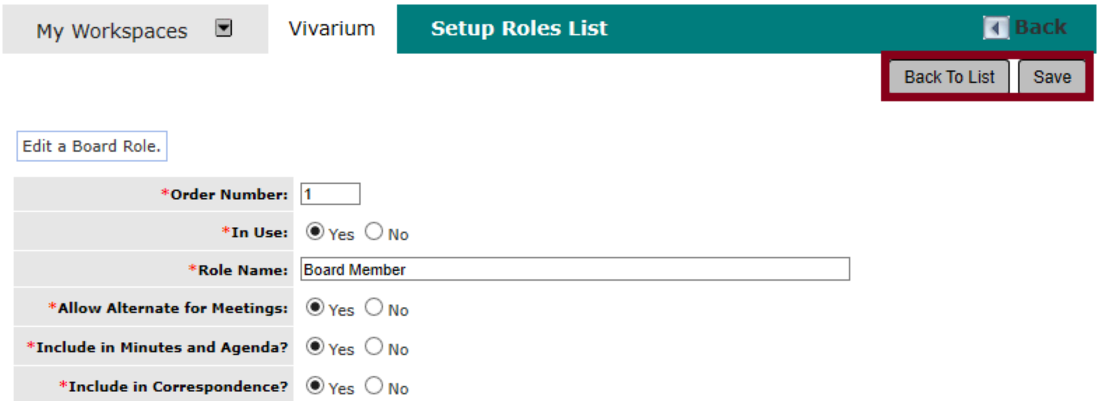
Filter By In Use is set to "Yes" by default. Select "No" here to display roles that are designated as not in use. *Note that this is a toggled setting, it is not possible to view both in use and not in use roles in a single list.*

Click the icon in the **Edit** column for the role.



Delete	Edit	Order	Role Name	Reserved	In-Use	Allow Alternate	Include on Agenda	Include in Correspondence
		1	Board Member	Yes	Yes	Yes	Yes	Yes
		2	Coordinator	Yes	Yes	No	Yes	Yes
		3	Chairperson	Yes	Yes	Yes	Yes	Yes
		4	Data Entry Member	Yes	Yes	No	Yes	Yes
		5	Non-Voting Member	Yes	Yes	No	Yes	Yes
		6	Alternate Member	Yes	Yes	No	Yes	Yes
		7	Vice-Chairperson	Yes	Yes	Yes	Yes	Yes
		8	Expediting Board Member	Yes	Yes	Yes	Yes	Yes
		9	Administrative Assistant	Yes	Yes	No	Yes	Yes
		10	Ex-Officio Member	Yes	Yes	No	Yes	Yes

The role is opened for editing in the **Edit a Board Role** panel. Edit each item in the panel as desired.



— **Order Number**: priority number of the role for review, signoff and correspondence routing; note that priority numbers are ranked in ascending order from highest to lowest, beginning with one (1) as the highest priority number

— **In-Use**: a selection of "Yes" indicates the role is currently in use on one or more studies / protocols and cannot be deleted; a selection of "No" here indicates the role is not currently in use and can be deleted

— **Role Name**: name assigned to the role; note that role names can be modified by the institution

— **Allow Alternate for Meetings**: a selection of "Yes" indicates an alternate person who is included in the Alternate For list under Animal Resource Center > User Management > Grant User Access & Define Roles can be selected to fulfill the meeting duties of this role when the primary assignee is unavailable; a "No" here indicates no alternate can be specified for the role

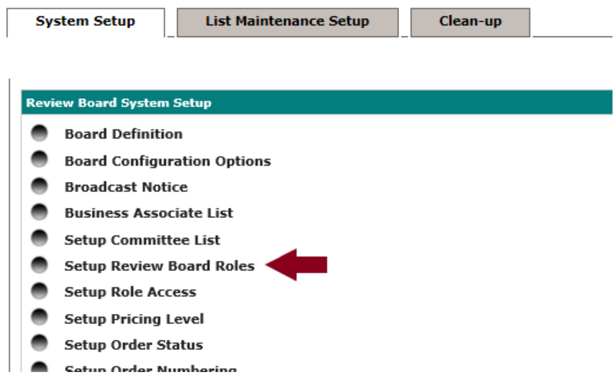
— **Include in Minutes and Agenda?**: a selection of "Yes" indicates users assigned to the role are selectable in the list of Attendees for a meeting date; where the flag is set to "No" users assigned to the role do not display in the meeting Attendees list for a meeting date and are not included in notifications related to the meeting

— **Include in Correspondence**: a selection of "Yes" indicates persons assigned to this role is/are to be included on the correspondence routing list; a "No" here indicates persons assigned to this role is/are not included on the correspondence routing list

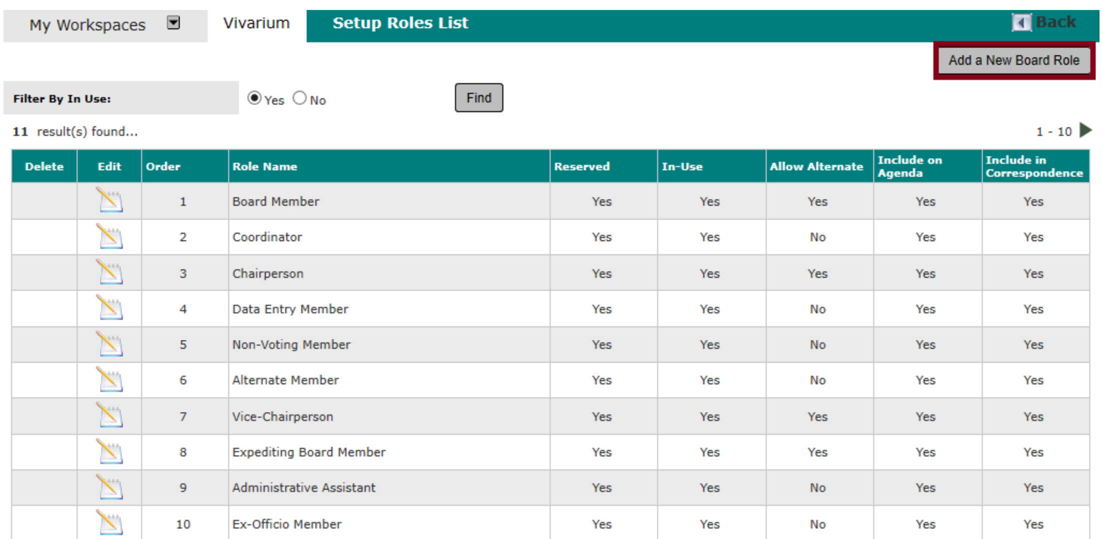
Make desired edits and click the **Save** button to save changes, close the edit panel and return to the **Setup Roles List** page. Click the **Back To List** button to return to the **Setup Roles List** page without saving changes.

Add Board Role

Navigate to Animal Resource Center > Review Board Administration > System Setup tab and click the **Setup Review Board Roles** link.

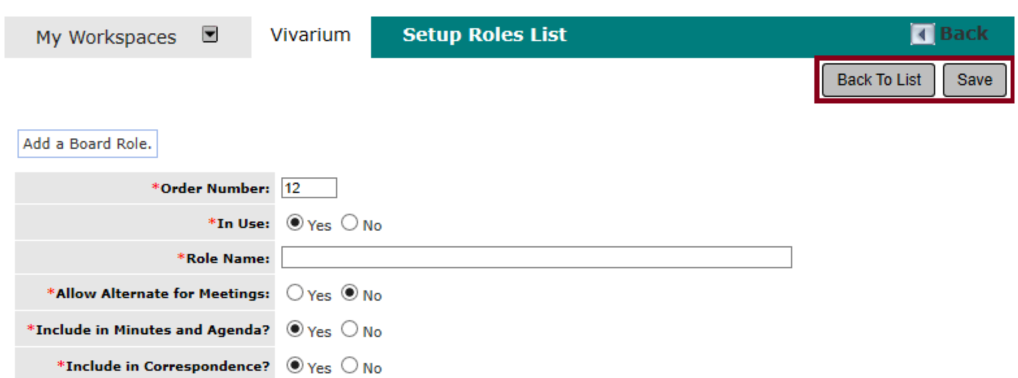


The **Setup Roles List** page is opened. Click the **Add a New Board Role** button.



Delete	Edit	Order	Role Name	Reserved	In-Use	Allow Alternate	Include on Agenda	Include in Correspondence
		1	Board Member	Yes	Yes	Yes	Yes	Yes
		2	Coordinator	Yes	Yes	No	Yes	Yes
		3	Chairperson	Yes	Yes	Yes	Yes	Yes
		4	Data Entry Member	Yes	Yes	No	Yes	Yes
		5	Non-Voting Member	Yes	Yes	No	Yes	Yes
		6	Alternate Member	Yes	Yes	No	Yes	Yes
		7	Vice-Chairperson	Yes	Yes	Yes	Yes	Yes
		8	Expediting Board Member	Yes	Yes	Yes	Yes	Yes
		9	Administrative Assistant	Yes	Yes	No	Yes	Yes
		10	Ex-Officio Member	Yes	Yes	No	Yes	Yes

The **Add a Board Role** panel opens for the role, with the same fields and buttons as the edit panel.



Default selections for the **Add a Board Role** panel are shown above. *Note that the **Order Number** field defaults to the next available **Order Number**, based on the existing list of roles.*

Enter the desired **Role Name** and edit other items as desired.

— **Order Number**: priority number of the role for review, signoff and correspondence routing; note that priority numbers are ranked in ascending order from highest to lowest, beginning with one (1) as the highest priority number

— **In-Use**: a selection of "Yes" indicates the role is currently in use on one or more studies / protocols and cannot be deleted; a selection of "No" here indicates the role is not currently in use and can be deleted

— **Allow Alternate for Meetings**: a selection of "Yes" indicates an alternate person who is included in the Alternate For list under Animal Resource Center > User Management > Grant User Access & Define Roles can be selected to fulfill the meeting duties of this role when the primary assignee is unavailable; a "No" here indicates no alternate can be specified for the role

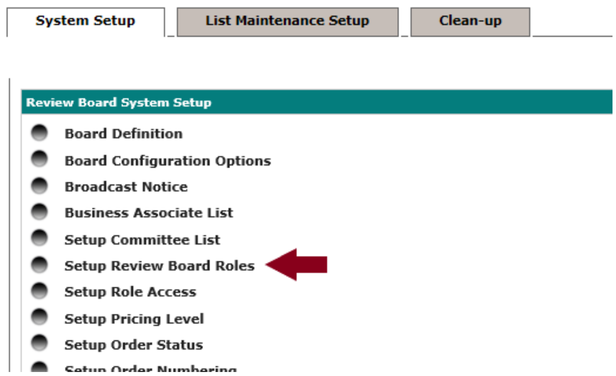
— **Include in Minutes and Agenda?**: a selection of "Yes" indicates users assigned to the role are selectable in the list of Attendees for a meeting date; where the flag is set to "No" users assigned to the role do not display in the meeting Attendees list for a meeting date and are not included in notifications related to the meeting

— **Include in Correspondence**: a selection of "Yes" indicates persons assigned to this role is/are to be included on the correspondence routing list; a "No" here indicates persons assigned to this role is/are not included on the correspondence routing list

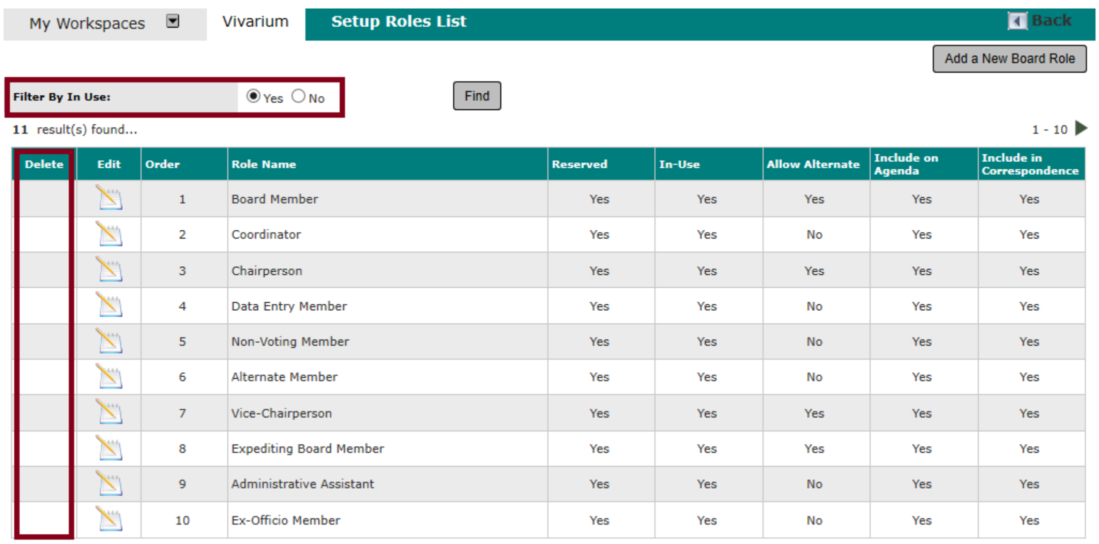
Click the **Save** button to save changes and return to the **Setup Roles List** page. Click the **Back To List** button to return to the **Setup Roles List** page without saving changes.

Delete Board Role

Navigate to Animal Resource Center > Review Board Administration > System Setup tab and click the **Setup Review Board Roles** link.



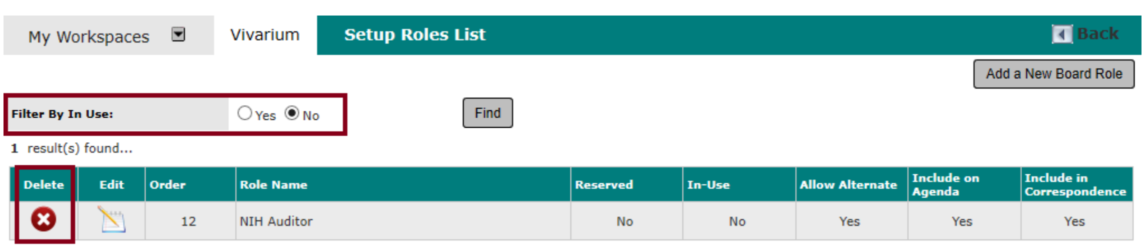
The **Setup Roles List** page is opened.



Delete	Edit	Order	Role Name	Reserved	In-Use	Allow Alternate	Include on Agenda	Include in Correspondence
		1	Board Member	Yes	Yes	Yes	Yes	Yes
		2	Coordinator	Yes	Yes	No	Yes	Yes
		3	Chairperson	Yes	Yes	Yes	Yes	Yes
		4	Data Entry Member	Yes	Yes	No	Yes	Yes
		5	Non-Voting Member	Yes	Yes	No	Yes	Yes
		6	Alternate Member	Yes	Yes	No	Yes	Yes
		7	Vice-Chairperson	Yes	Yes	Yes	Yes	Yes
		8	Expediting Board Member	Yes	Yes	Yes	Yes	Yes
		9	Administrative Assistant	Yes	Yes	No	Yes	Yes
		10	Ex-Officio Member	Yes	Yes	No	Yes	Yes

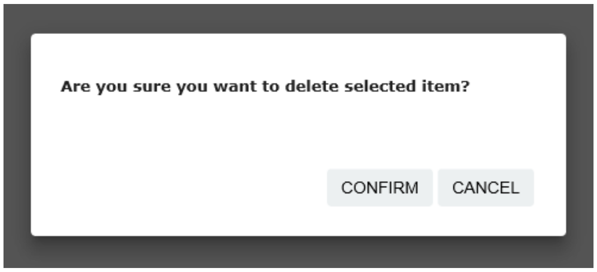
Because **Reserved** roles and in-use roles cannot be deleted, there are no icons in the **Delete** column for those roles on the **Setup Roles List** page.

Change the **Filter By In Use** option to “No” and click the **Find** button to view a list of roles that can be deleted. Click the icon in the **Delete** column to delete a role.



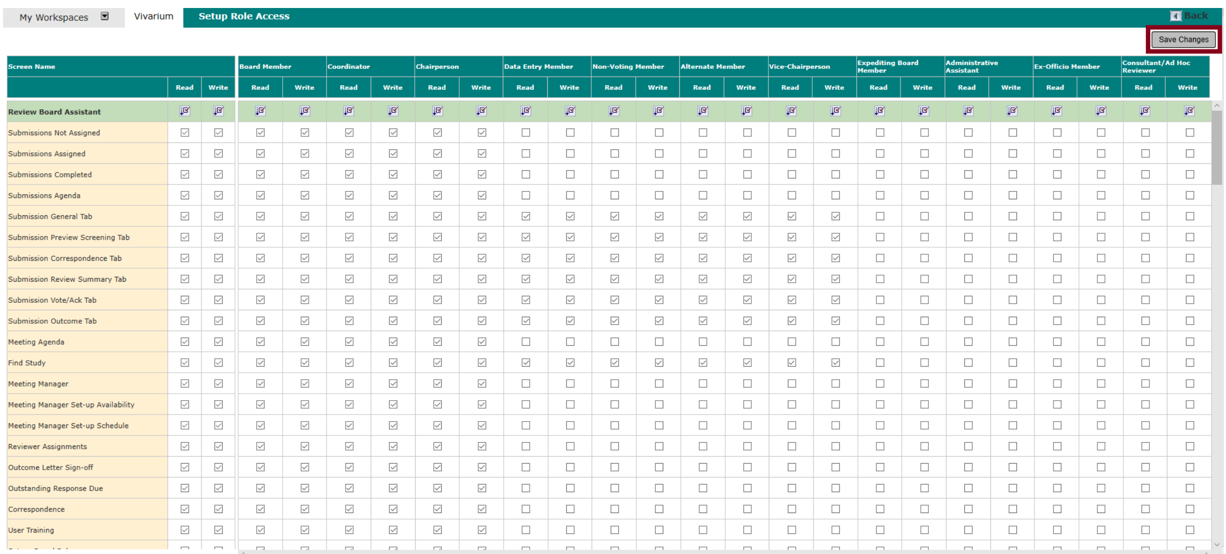
Delete	Edit	Order	Role Name	Reserved	In-Use	Allow Alternate	Include on Agenda	Include in Correspondence
		12	NIH Auditor	No	No	Yes	Yes	Yes

A confirmation popup window appears. Click **CANCEL** to return to the **Setup Roles List** page without saving changes. Click **CONFIRM** to delete the role and return to the **Setup Roles List** page.



Setup Role Access

The **Setup Role Access** page is where the System Administrator assigns read and write access privileges to review board roles for applicable iRIS™ pages.



All applicable iRIS™ pages for the ARC module are listed in a column at the left side of the matrix. Column headers display all applicable review board roles.

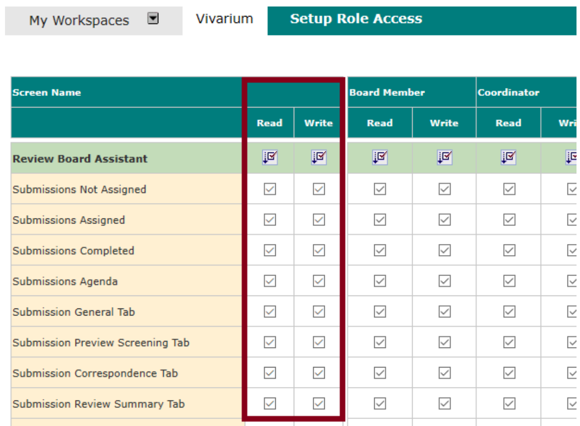
The System Administrator assigns **Read** and **Write** privileges for each page by role. The applicable system page is shown in the column at left, and the System Administrator clicks the **Read** and/or **Write** select checkboxes in the role columns at right to assign the applicable rights.

If both are selected, users assigned to the role can view and update records on the applicable page. If the page allows for record deletion, users assigned to a role with both **Read** and **Write** access for the page can delete records on the page as well.

If **Read** is selected but **Write** is not, users assigned to the role can view the applicable page but cannot modify or delete records on the page.

Note that any role with **Write** access must also have **Read** access assigned.

The first two **Read** and **Write** columns do not have an associated role. These columns are used to turn access on or off for the applicable page, regardless of user role. Settings in these columns override settings in the role-specific columns to the right.



To make a given page read-only for *all* iRIS™ users, the system administrator selects the **Read** checkbox and de-selects the **Write** checkbox for the page.

To hide a page entirely the System Administrator de-selects both checkboxes for the page.

Where both checkboxes are selected for a given page, the system administrator can assign **Read** and **Write** access per role using the checkboxes in the columns at the right.

Click the **Save Changes** button to save changes.

Order and Billing Items

Several links under Animal Resource Center > Review Board Administration > System Setup tab are involved in order and billing functionality within the iRIS™ system. For further information about setup of any of the following items please see the Animal Resource Center — Orders and Billing manual.

— Setup Pricing Level

— Setup Order Status

— Setup Order Numbering

— Setup Ticket Numbering

— Setup Material Order List

— Setup Material Order Item List

— Setup Transfer Order Numbering

— Setup Per Diem Definitions and Rates

— Setup Charge Master

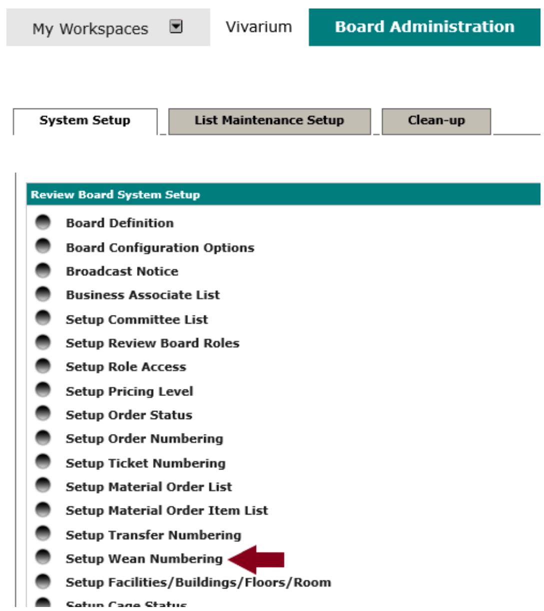
— Setup Vendor Email Template

— Setup Invoice Type

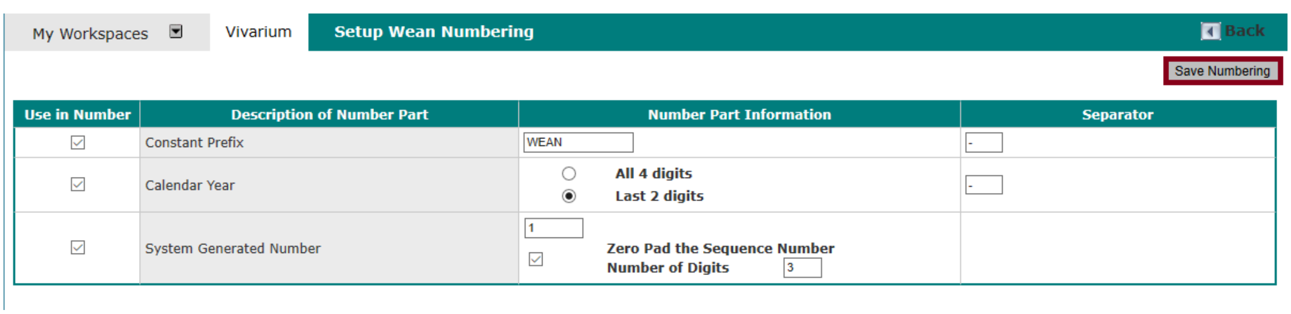
Setup Wean Numbering

Juvenile study subject animals are classified as “wean” subjects, not yet ready to join the main population of adult study animals. Wean subjects can be tracked in iRIS™ using a separate numbering scheme from that employed for adult animals.

To configure wean numbering, click the **Setup Wean Numbering** link under Animal Resource Center > Review Board Administration > System Setup tab.



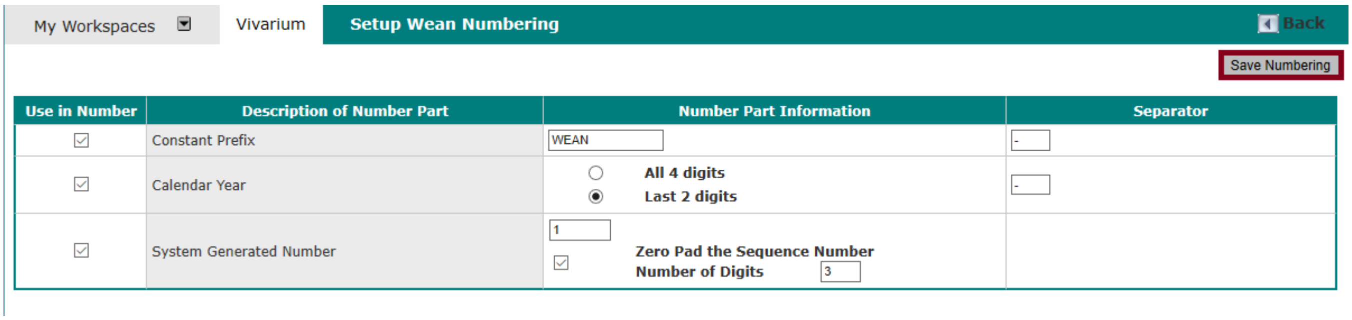
The **Setup Wean Numbering** page opens.



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

Options to pad the **System Generated Number** with leading zeroes, set a fixed digit count for numbers to be generated, and insert an optional **Separator** character are also available.

In the screenshot shown below, a wean numbering scheme that employs all available options is configured.



The **Constant Prefix** is “WEAN”.

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

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

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

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

The first wean number generated by this scheme would be:

WEAN-19-001

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

Setup Facilities/Buildings/Floors/Rooms

iRIS™ includes numerous tools to assist with facilities management related to subject animal husbandry and study activity.

For full details of facilities tracking and management in iRIS™, see the Animal Resource Center — Facilities manual.

Cages

The iRIS™ system provides numerous tools for animal subject cage tracking and management, including fields for entry of cage type, status, count and location, and the ability to print bar coded cage cards.

For more information about any of the items below, see the Animal Resource Center — Cages manual.

— Setup Cage Status

— Setup Cage Types

— Setup Cage Records

— Setup Cage Reason and Description

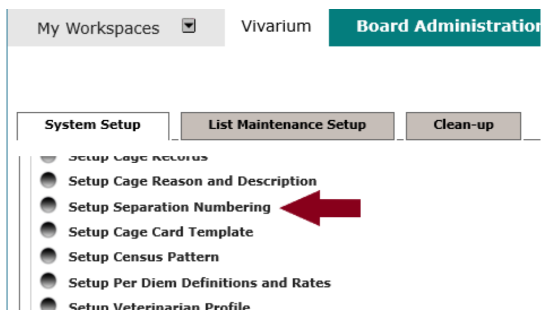
— Setup Separation Numbering

— Setup Cage Card Template

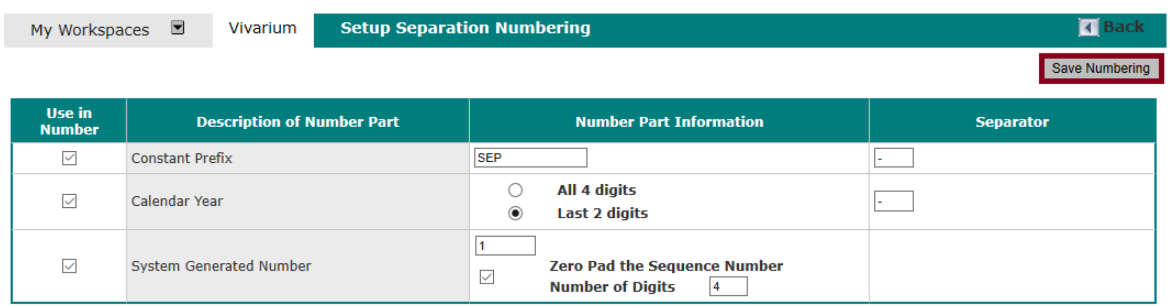
Setup Separation Numbering

Animal subjects separated from their original population or cage can be tracked in iRIS™ using a separate numbering scheme from that employed on their original population or cage.

To configure separation numbering, click the **Setup Separation Numbering** link under Animal Resource Center > Review Board Administration > System Setup tab.



The **Setup Separation Numbering** page opens.



In the screenshot shown above, a separation numbering scheme that employs all available options is configured.

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

Options to pad the **System Generated Number** with leading zeroes, set a fixed digit count for numbers to be generated, and insert an optional **Separator** character are also available.

The **Constant Prefix** is “SEP”.

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

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

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

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

The first wean number generated by this scheme would be:

SEP-19-0001

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

Livestock Management

The iRIS™ system provides numerous tools for animal subject tracking and management, including fields for entry of veterinarian and transfer coordinator details.

For more information about any of the functions below, see the Animal Resource Center — Livestock Setup manual.

Setup Veterinarian Profile

Setup Transfer Coordinator Profile

Setup Treatment Plan Templates by Species

Setup Generation

Setup Life Status

Setup Coat Color

Setup Diet

Setup Origin Type

Setup Health Status

Setup Breeding Status

Setup Breeding Type

Setup Gene

Setup Allele

Observation Management

Setup Observation Diagnosis

Setup Observation Outcome

Setup Observation Treatment

Setup Vendor Email Template

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

For full details of configuration items related to orders and billing in iRIS™, see the Animal Resource Center — Orders & Billing manual.

Setup Invoice Type

The iRIS™ system provides tools for configuration of invoice types specific to each institution's needs.

For full details of configuration items related to orders and billing in iRIS™, see the Animal Resource Center — Orders & Billing manual.

For full details of *processing* items related to orders and billing in iRIS™, see the Animal Resource Center — Orders & Billing Processing manual.

Document Templates

The iRIS™ system provides tools for creation of pre-formatted document templates that include commonly used boilerplate text and can pull a variety of system data into a document on the fly, when a document is generated.

The general process for template setup and use is the same, regardless of the document or correspondence type.

— **Template Definition**: a template containing standardized boilerplate text for the desired document or correspondence type (e.g., meeting agenda, meeting minutes, vendor email, outcome letter, etc.) is created and formatted in a rich text editor

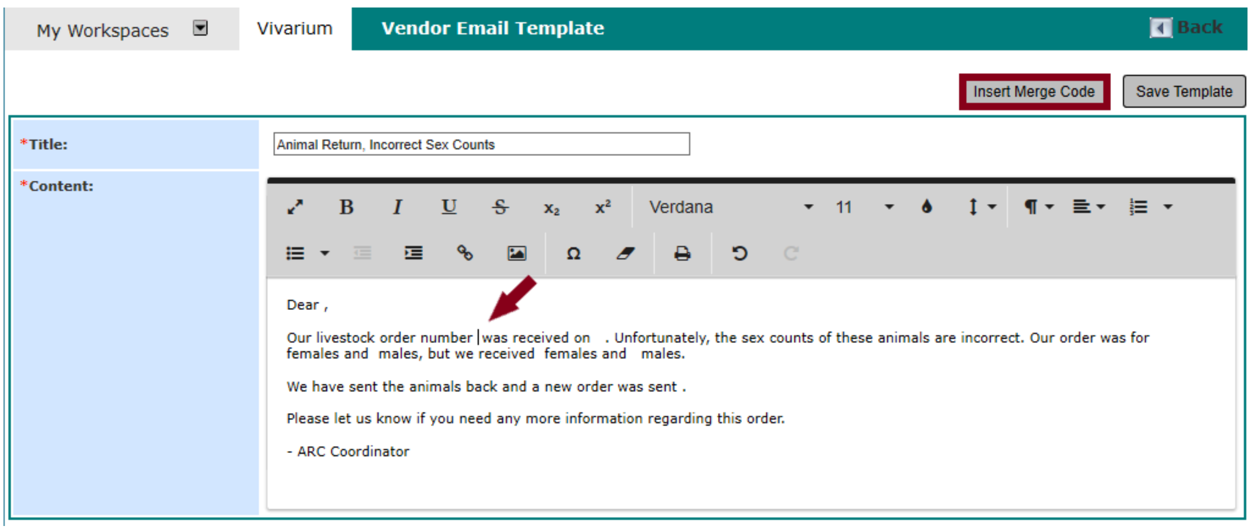
— **Merge Code Addition**: where the document or correspondence type needs to include specific data pulled from the iRIS™ system (e.g., order number, review board name, vendor email address, quantity of animals ordered, etc.), the applicable Merge Code for each needed data item is added to the template

— **Document / Correspondence Generation**: when a template-based document / correspondence is generated by an iRIS™ user, the pre-formatted template serves as the default starting point for the document / correspondence; the user edits the document / correspondence as desired before printing or sending it

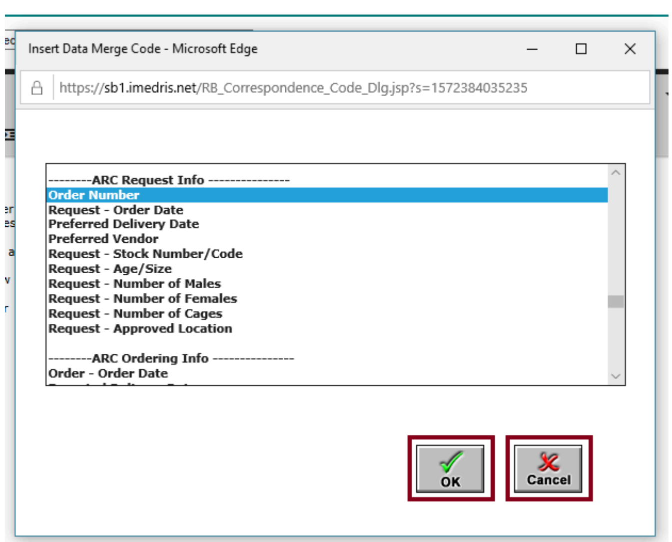
The use of templates reduces time and effort demands on the user, reduces user error, and streamlines enforcement of institutional communication standards and policies.

Using Merge Codes in Document Templates

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

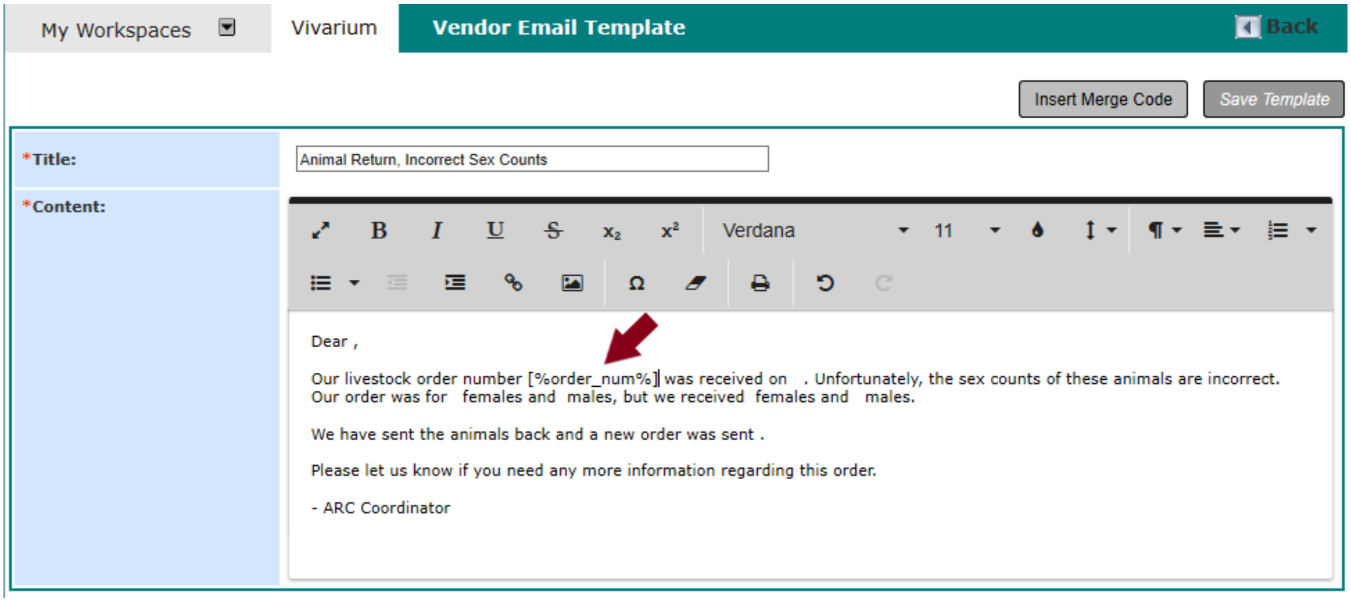


The **Insert Data Merge Code** popup window displays. Scroll down to the sections of the list labeled for ARC and select the desired Merge Code. In this example, the Merge Code for “Order Number” is selected.

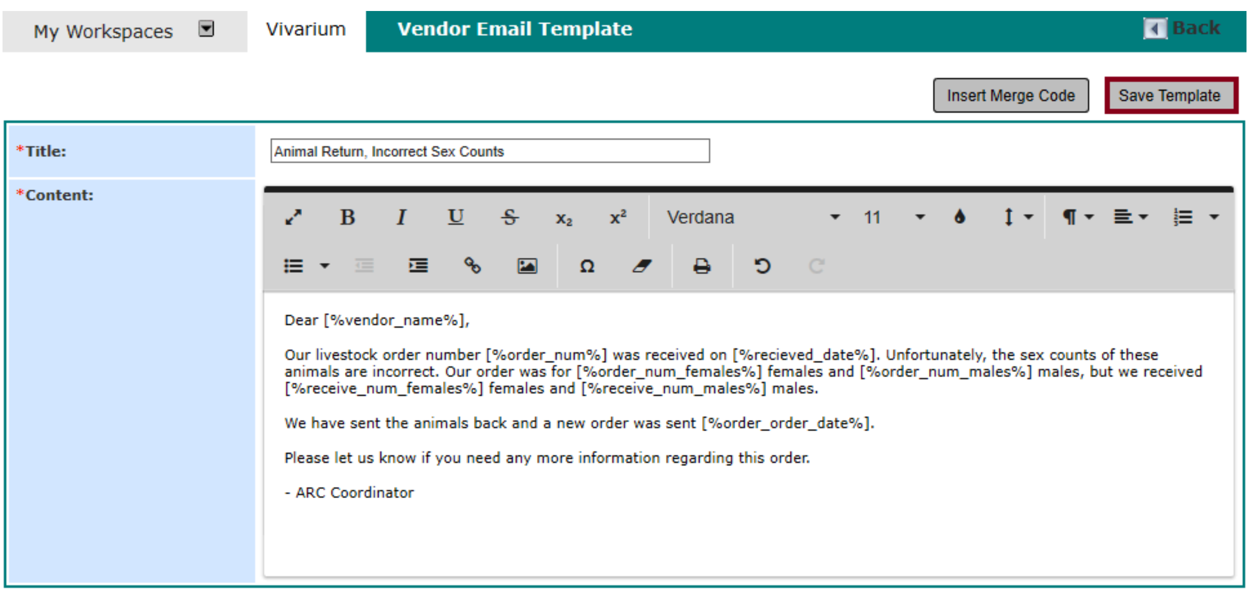


Click the **Cancel** button to close the popup without inserting the Merge Code.

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



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.



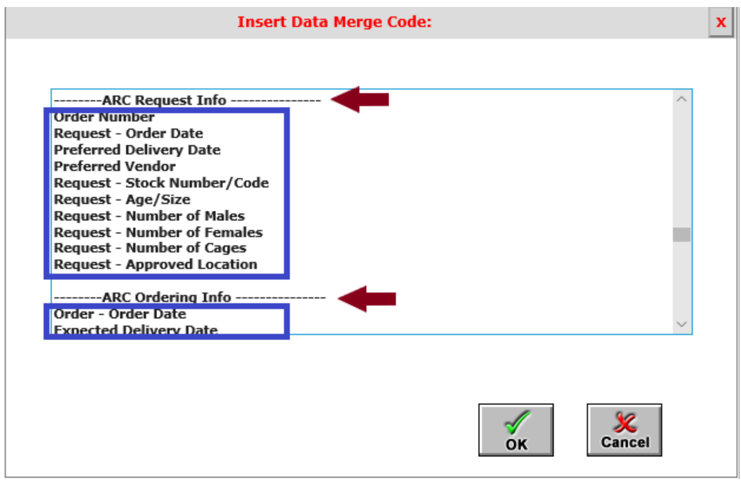
Click the **Save Template** button to save changes.

Merge Code List

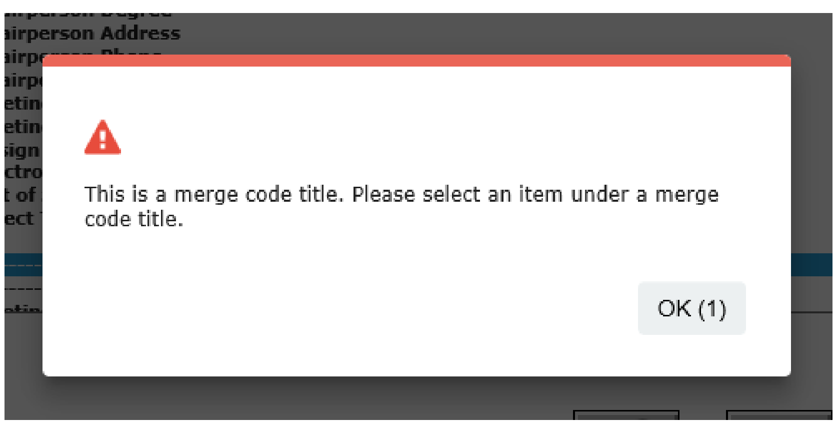
Depending on the user's data access rights and the institution's Review Board Administration settings, the Merge Code list can include system data from the following categories:

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

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



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



Merge Codes Applicable to ARC

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

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

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

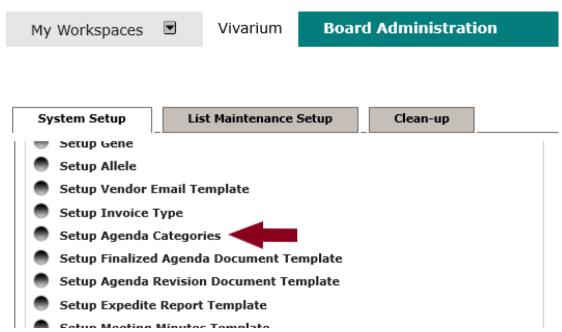
---Review Board Info ---	---Meeting Attendance Codes ---	---Submission Info ---
	Members Absent	Sponsor/Funding Source
	Member Ex-officio Present	Proposal Number
	Administrative Staff Present	Proposal Title
	Guests Present	Proposal Short Title
	Meeting Motions	Project Award Number
		Project Previous Award Number
		Project Open Ended
		Is Archived
		Archived Location

Setup Agenda Categories

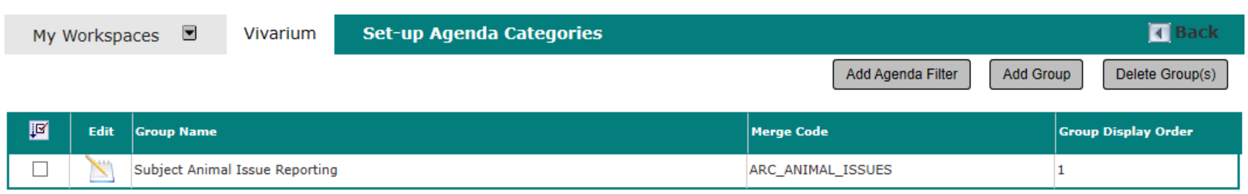
The iRIS™ system provides the ability to configure a list of agenda topic categories that are frequently addressed in review meetings, including the ability to attach relevant forms or documents where applicable.

Once configured, these categories can be added to a finalized agenda template with just a few clicks rather than repetitive keystrokes (see the Setup Finalized Agenda Document Template section of this manual for more information).

This functionality is provided on the **Set-up Agenda Categories** page. To access the page, click the **Setup Agenda Categories** link under Animal Resource Center > Review Board Administration > System Setup tab.



The **Set-up Agenda Categories** page opens, as shown below.



Columns and controls on this page are:

— select: far-left column, no header label; select the desired checkbox(es) here to select the corresponding record(s)

— **Edit**: click the icon in this column to open the corresponding category for editing

— **Group Name**: designated category name

— **Merge Code**: designated short text to be used in document templates, such as the Finalized Agenda Document Template, to pull the corresponding category name and any associated form or document requirements into the template

— **Group Display Order**: the order in which the applicable category is to be shown on the meeting agenda

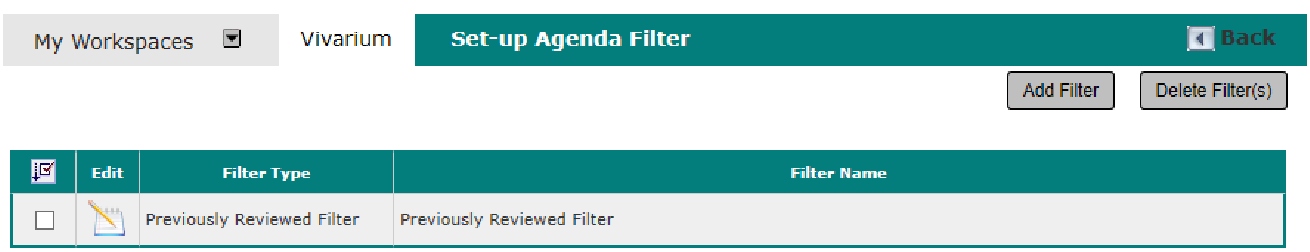
— **Add Agenda Filter** button: click this button to open the Set-up Agenda Filter page, where rules can be configured to exclude study or review item documents from the meeting agenda that would otherwise be captured by an agenda category (see next subsection of this manual, Agenda Filter)

— **Add Group** button: click this button to open an add panel for creation of a new agenda category

— **Delete Group(s)** button: click this button to delete any agenda category selected in the far-left column

Agenda Filter

On the **Set-up Agenda Filter** page (shown below), agenda filters are configured to group review document items. Once configured, agenda filters can be applied to include or exclude certain document types when assigning documents to agenda categories.



Columns and controls on this page are:

— select: far-left column, no header label; select the desired checkbox(es) here to select the corresponding record(s)

— **Edit**: click the icon in this column to open the corresponding filter for editing

— **Filter Type**: name of category / type of exclusion

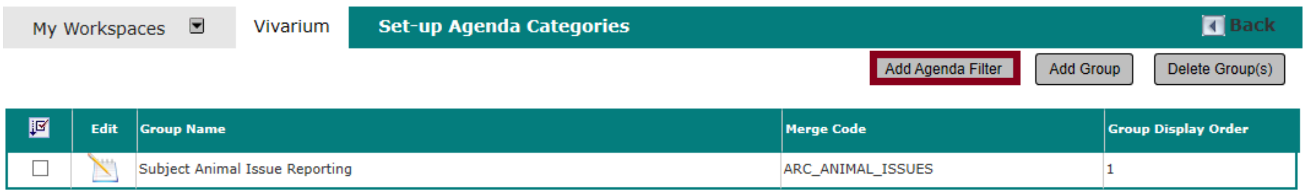
— **Filter Name**: defaults to same value as **Filter Type**

— **Add Filter** button: click this button to open an add panel for creation of a new filter

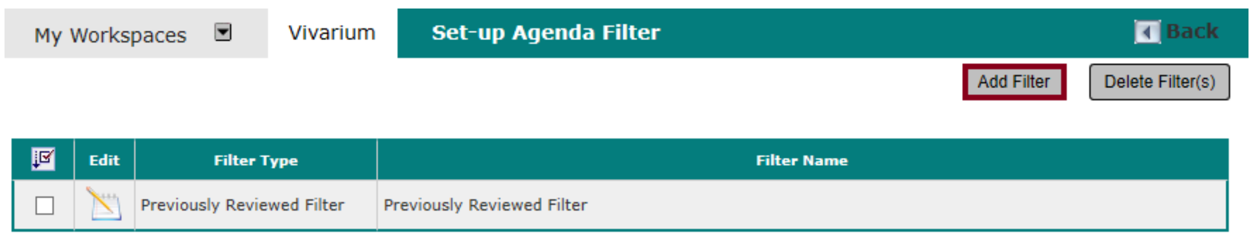
— **Delete Filter(s)** button: click this button to delete any filter selected in the far-left column

Add Agenda Filter

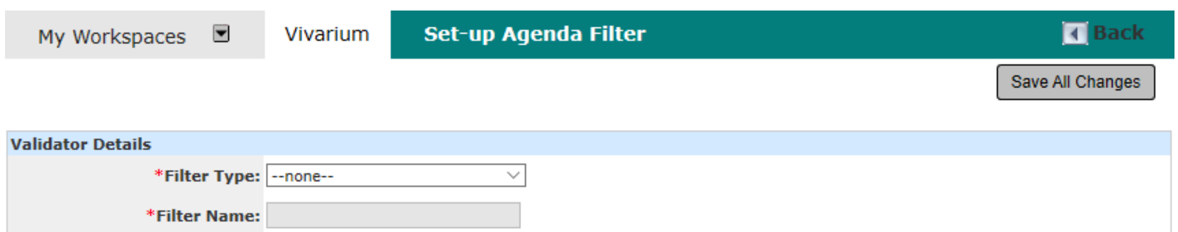
Click the **Add Agenda Filter** button on the **Set-up Agenda Categories** page.



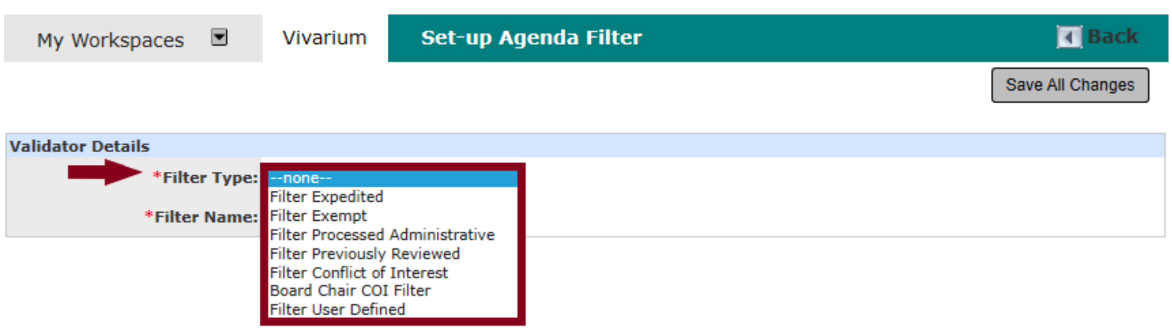
As shown below, the **Set-up Agenda Filter** page opens.



Click the **Add Filter** button. As shown below, an add panel is opened for creation of the new filter.

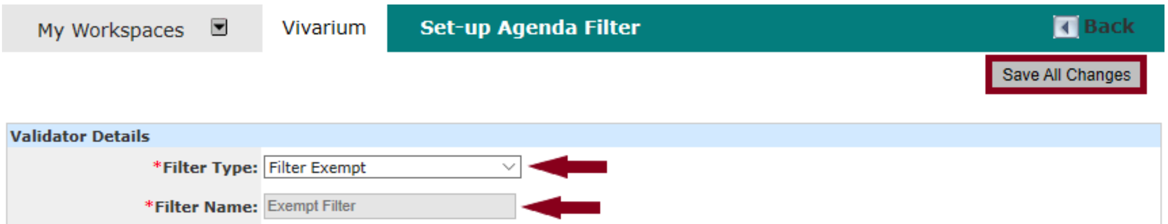


Click in the **Filter Type** field to open a dropdown picklist. Click the desired list item to select it.

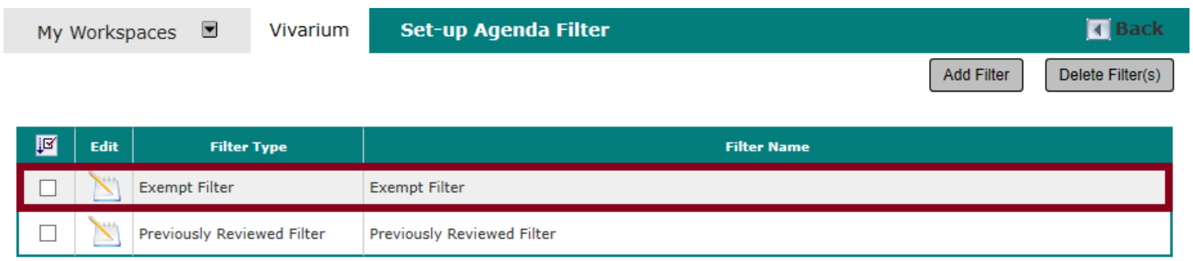


As shown below, in the case of any **Filter Type** selection other than “Filter User Defined” the **Filter Name** field automatically populates with text corresponding to the selected **Filter Type** and is set to read only.

See the Filter User Defined subsection of this manual for more information about configuring user defined filters.

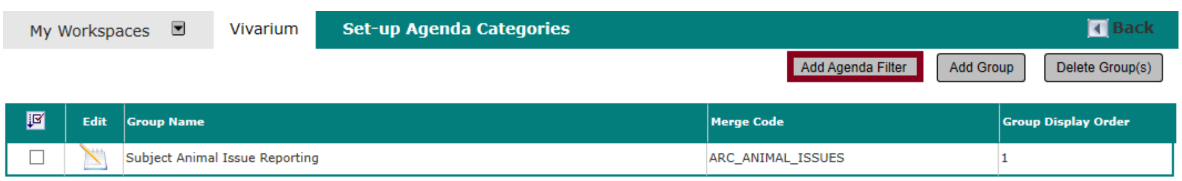


Click the **Save All Changes** button to save the filter and close the add panel. As shown below, the filter is added to the list on the **Set-up Agenda Filter** page.

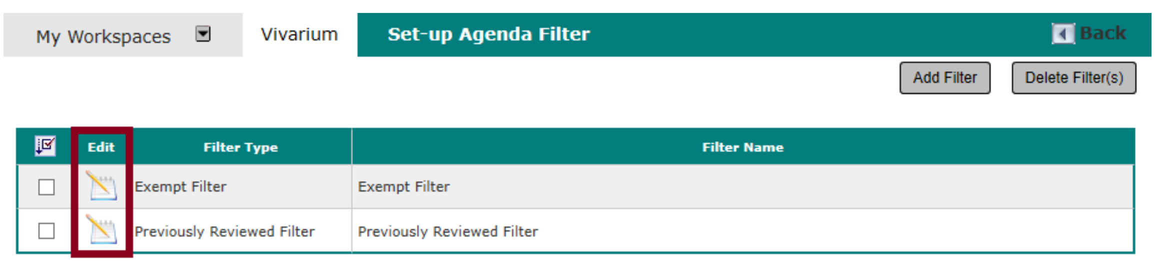


Edit Agenda Filter

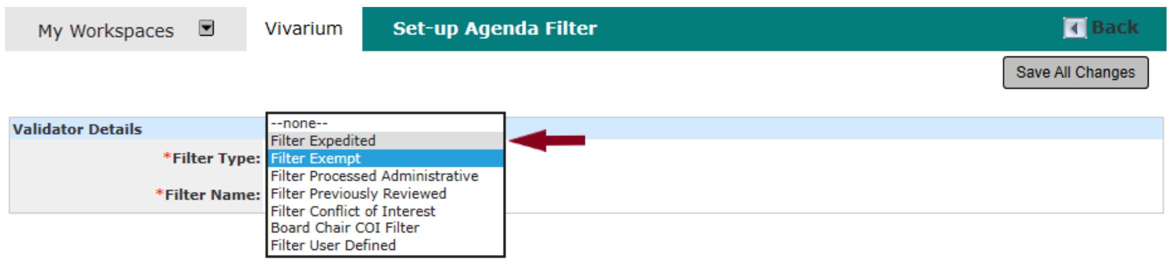
Click the **Add Agenda Filter** button on the **Set-up Agenda Categories** page.



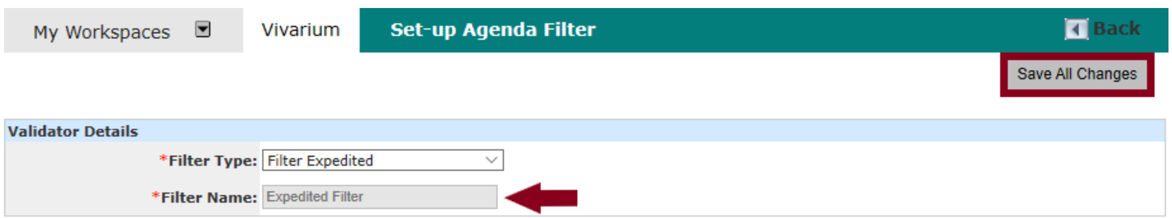
As shown below, the **Set-up Agenda Filter** page opens. Click the icon in the **Edit** column for the applicable filter.



As shown below, the record is opened in an edit panel. Click in the **Filter Type** field to expand the dropdown picklist and select the desired item.

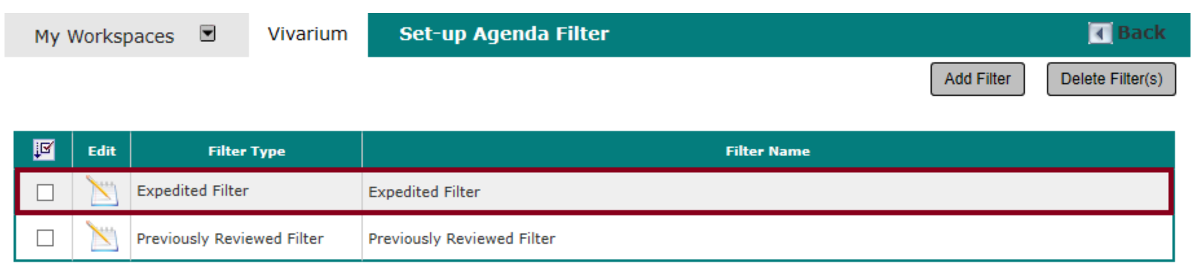


As shown below, in the case of any **Filter Type** selection other than "Filter User Defined" the **Filter Name** field automatically populates with text corresponding to the selected **Filter Type** and is set to read only.



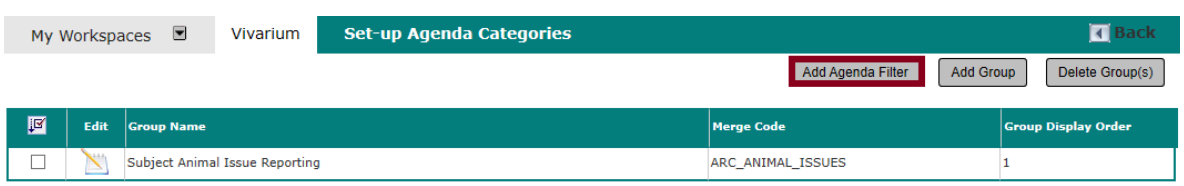
See the Filter User Defined subsection of this manual for more information about configuring user defined filters.

Click the Save All Changes button to save changes and close the edit panel. As shown below, the filter is revised in the list on the **Set-up Agenda Filter** page.

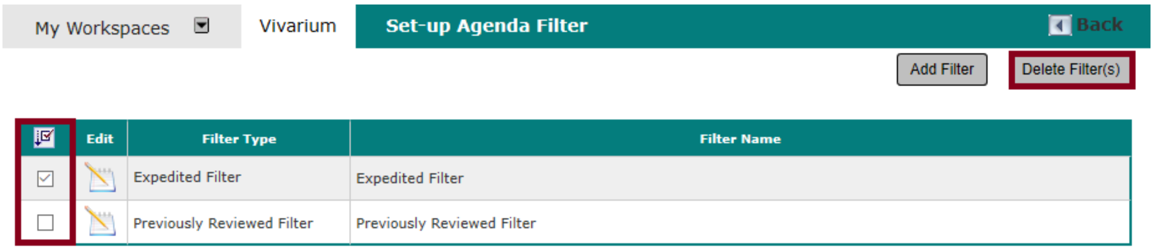


Delete Agenda Filter

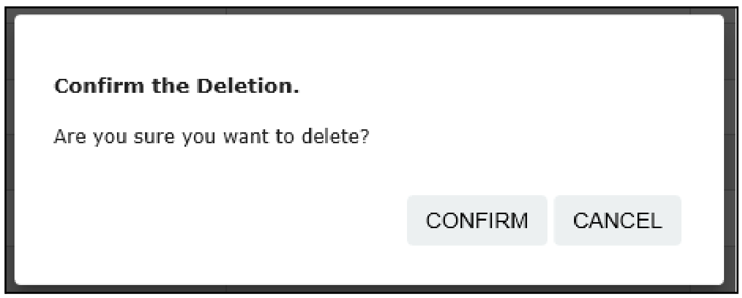
Click the **Add Agenda Filter** button on the **Set-up Agenda Categories** page.



As shown below, the **Set-up Agenda Filter** page opens. Select the checkbox(es) in the far-left column for the filter(s) to be deleted, then click the **Delete Filter(s)** button.

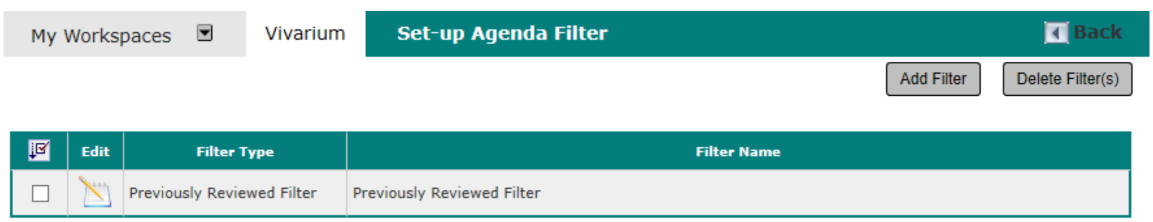


A confirmation popup window displays.



Click **CANCEL** to return to the **Set-up Agenda Filter** page without deleting the filter(s).

Click **CONFIRM** to delete the filter(s) and return to the **Set-up Agenda Filter** page. As shown below, the selected filter is removed.

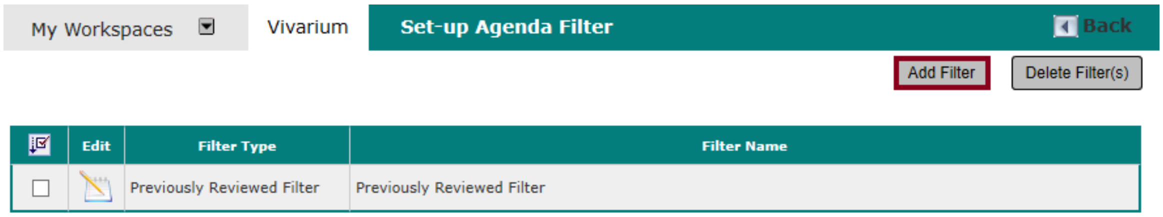


Filter User Defined

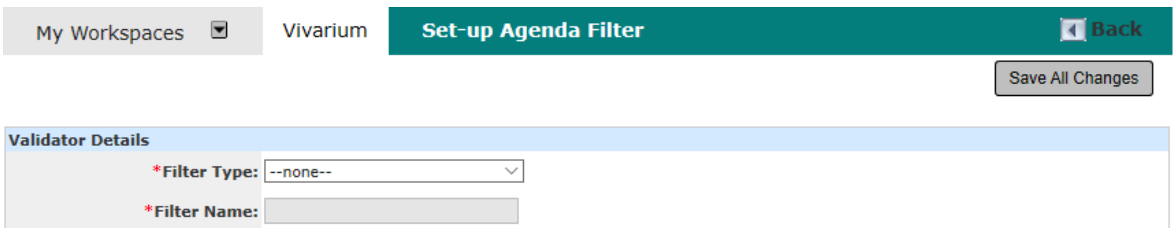
Note that familiarity with Structured Query Language (SQL), as well as a thorough knowledge of iRIS™ application modules, associated tables, custom forms and fields are required to create user defined filters using this feature.

Click the **Add Agenda Filter** button on the **Set-up Agenda Categories** page.

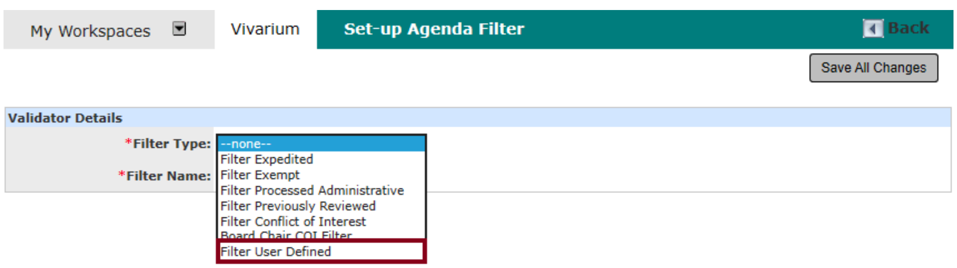
As shown below, the **Set-up Agenda Filter** page opens.



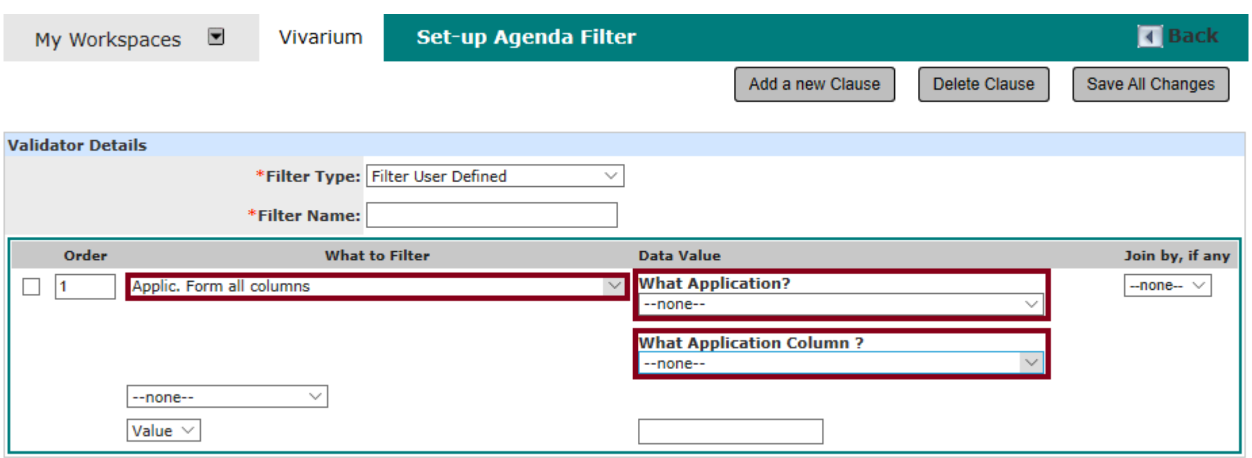
Click the **Add Filter** button. As shown below, an add panel is opened for creation of the new filter.



Click in the **Filter Type** field to open a dropdown picklist. Click "Filter User Defined" to select it.

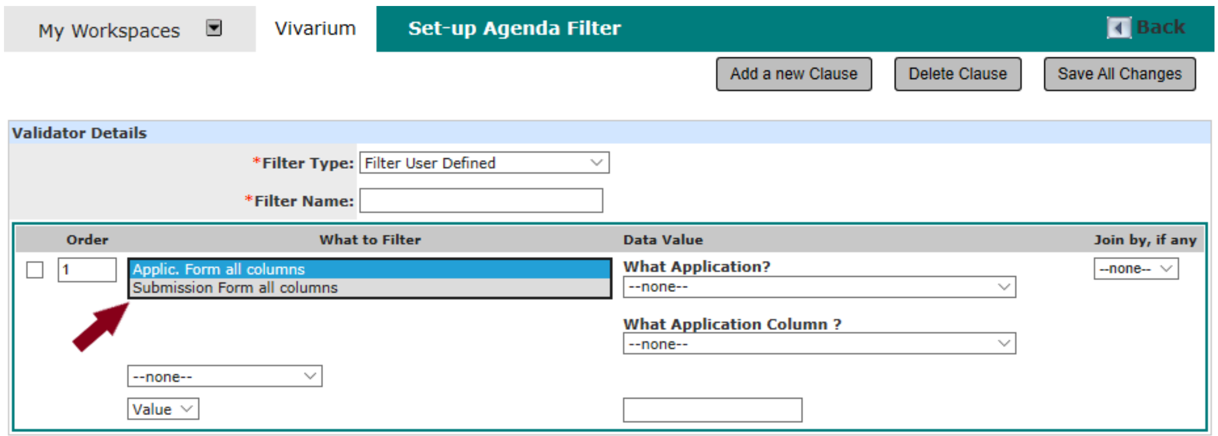


An add panel is opened for configuration of a custom filter query.

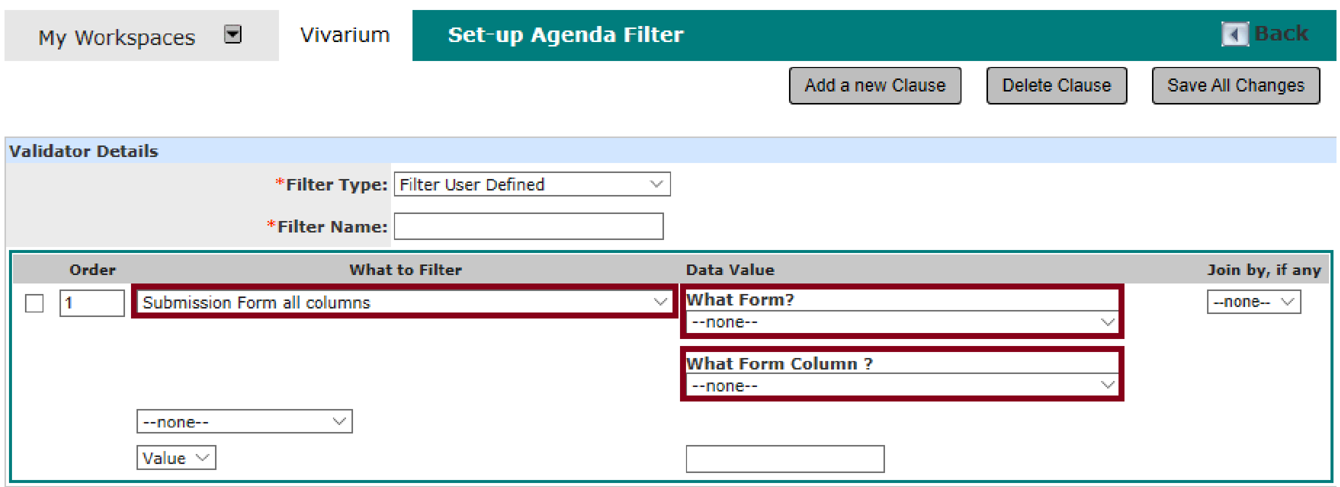


As shown in the screenshot above, the **What to Filter** field in the query builder form defaults to "Applic. Form all columns", and the corresponding Data Value fields default to **What Application?** and **What Application Column?**

In the screenshot below the **What to Filter** dropdown is expanded, showing that a second selection of "Submission Form all columns" is available.



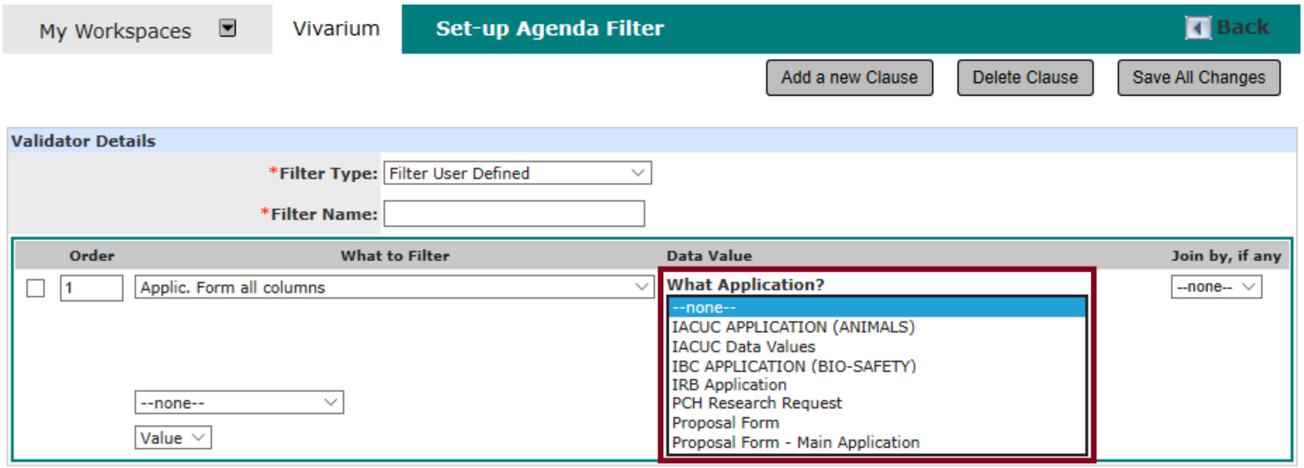
When "Submission Form all columns" is selected the **Data Value** fields update to reflect options applicable to the Submission Form.



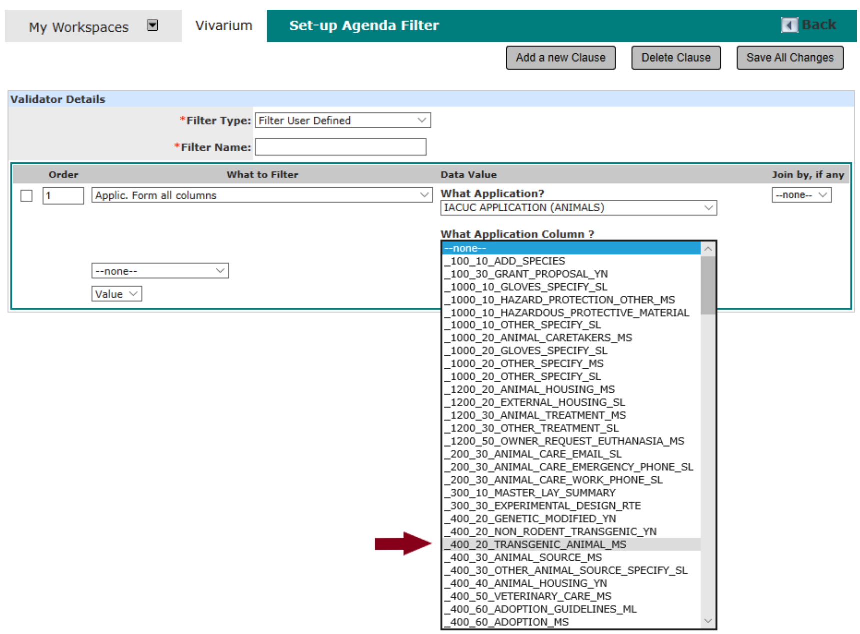
The **What Form?** dropdown list is populated with the names of forms configured for the specific institution, and the **What Form Column?** dropdown list is populated with items specific to the selected form.

*Note that the overall process of creating a user defined filter is the same regardless of whether "Submission Form all columns" or "Applic. Form all columns" is selected under **What to Filter**. The user selects the desired submission / application form, then selects a specific field from that form to compare against in the query.*

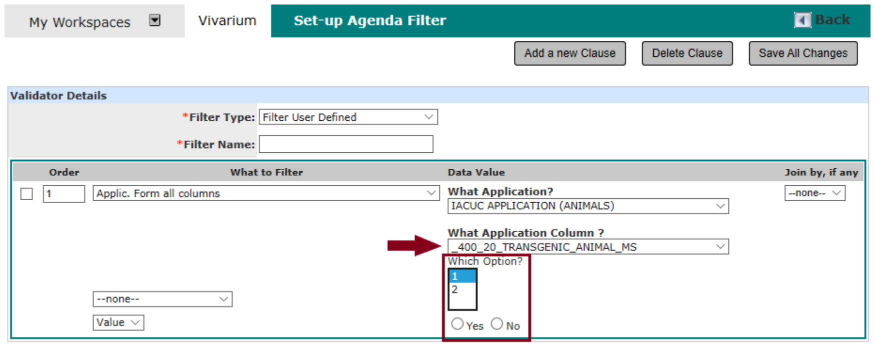
With the default selection of "Applic. Form all columns" in place, the **What Application?** dropdown list populates with application types. Click an application type in the list to select it.



As shown below, the **What Application Column?** dropdown list automatically populates with sections and questions applicable to the selected application.

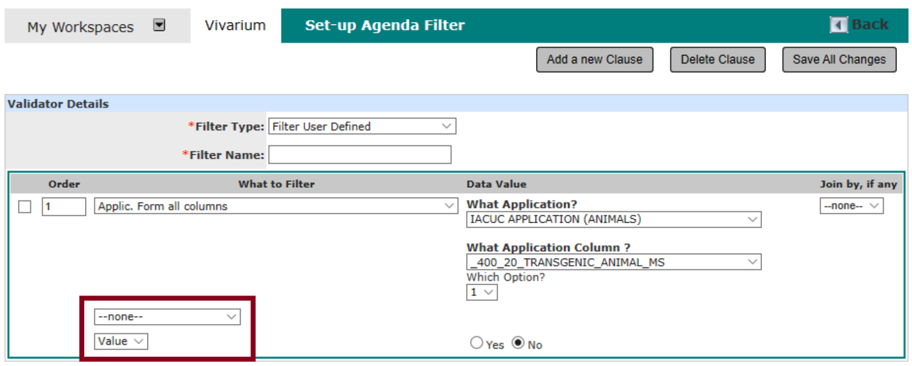


Click the desired item in the **What Application Column?** dropdown list to select it. As shown below, the area beneath the **What Application Column?** field populates with options applicable to the selected column item.

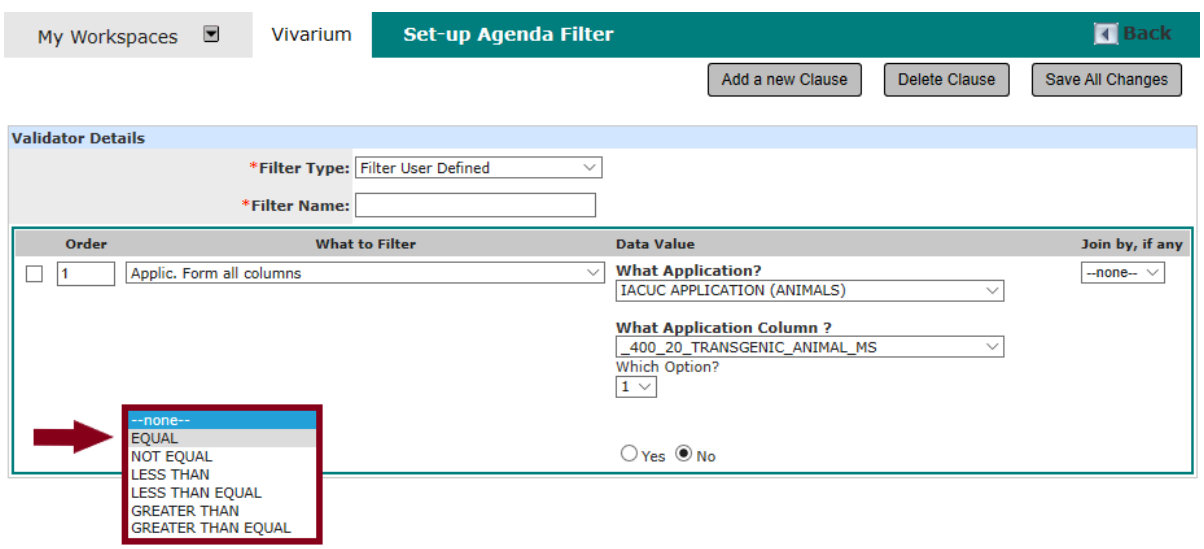


A thorough knowledge of iRIS™ data tables is required to understand the auto-populated options provided.

Make desired selections in the area beneath the **What Application Column?** field, then select the desired comparator and data type from the dropdown lists at the lower left of the panel.



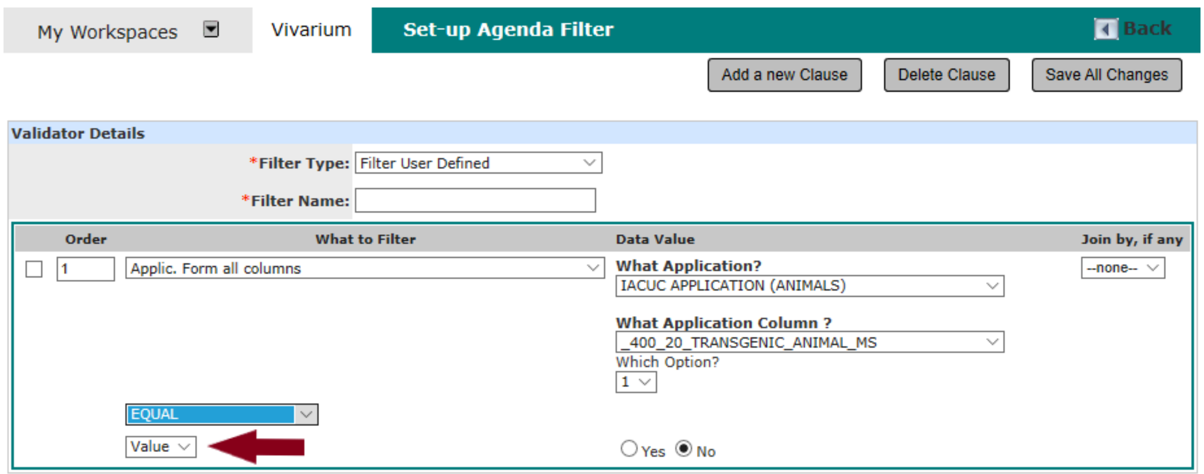
As shown below, the comparator dropdown contains all standard SQL query comparators. It is up to the user constructing the query to select a comparator type that is applicable to the selected Application Column value to the right of the comparator field.



Comparators of “NOT EQUAL” or “EQUAL” can be used for comparisons against Yes/No and text fields. The remaining comparators are used for comparisons against numeric values.

In this example a comparator of “EQUAL” is selected because the Application Column value can only be “Yes” or “No”.

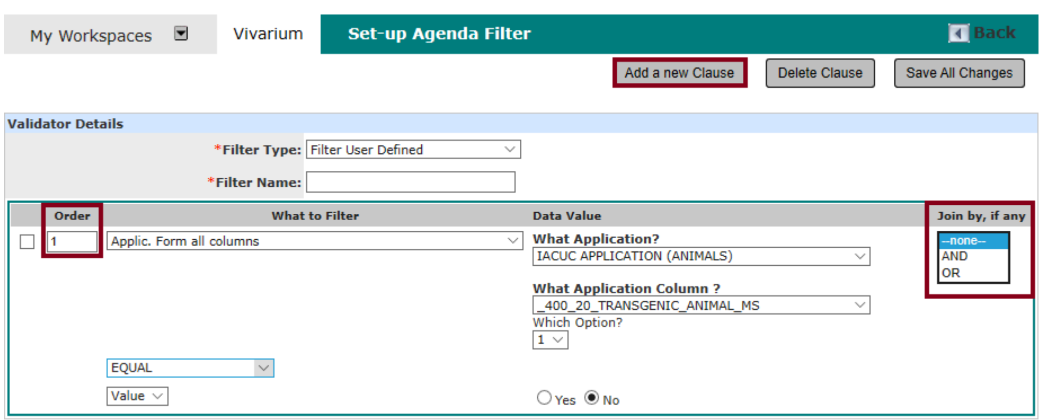
Note that the second comparator field defaults to “Value” but will dynamically update with other options where such options are applicable to Application Column and comparator selections.



In the screenshot above the first clause of the user defined filter query is complete. This query returns IACUC applications where “No” is selected for option 1 of the question about whether transgenic animals are to be used in the study.

Note that when a configured filter is applied during creation of an Agenda Category, the user is prompted to choose whether to include or exclude records matching the filter’s criteria.

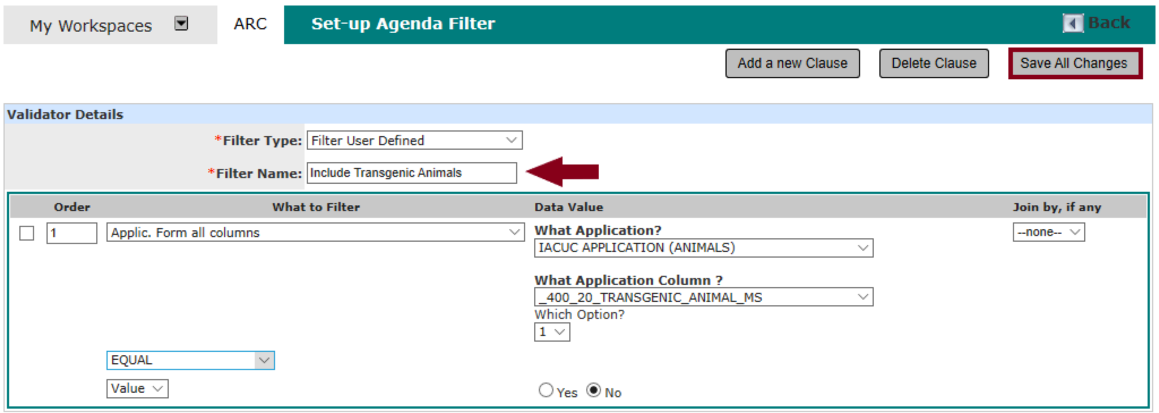
Click the **Add a new Clause** button to add another filter configuration panel to the page, adding another clause to the filter query.



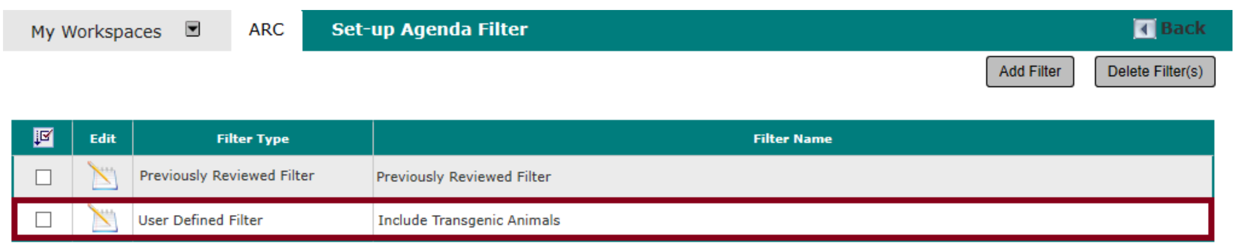
When the query includes two or more clauses the **Join by, if any** field is used to specify the join type and the **Order** field is used to specify the order in which each clause is to be evaluated when the query runs.

SQL familiarity is required to correctly configure the ***Order*** *and* ***Join by, if any*** *fields.*

After all desired clauses have been configured for the query, enter a **Filter Name** and click the **Save All Changes** button to save the filter.

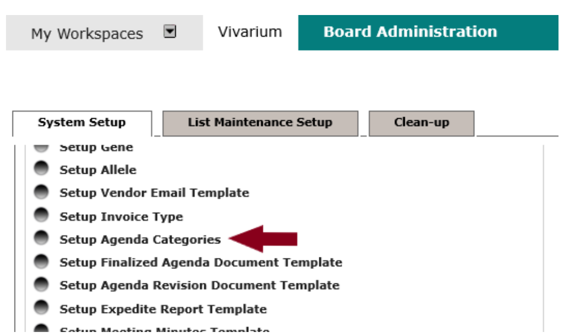


The filter is added on the **Set-up Agenda Filter** page.

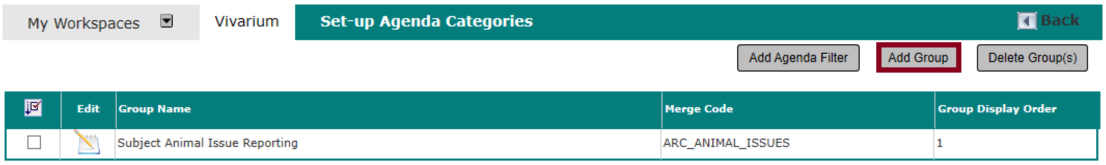


Add Agenda Category

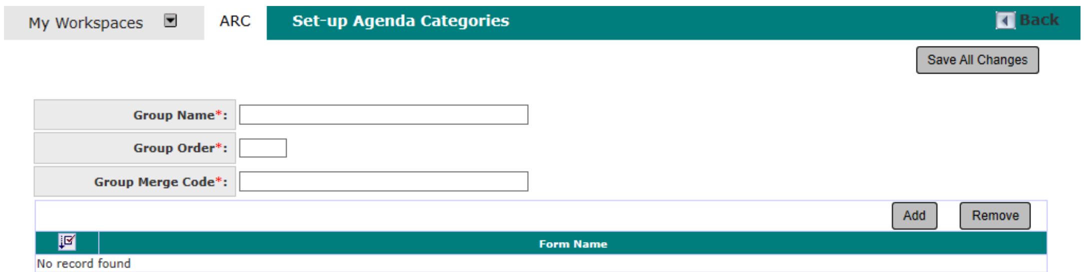
Click the **Setup Agenda Categories** link under Animal Resource Center > Review Board Administration > System Setup tab.



The **Set-up Agenda Categories** page opens, as shown below.



Click the **Add Group** button. An add panel is opened for creation of the new category.



Complete the top of the add panel as follows:

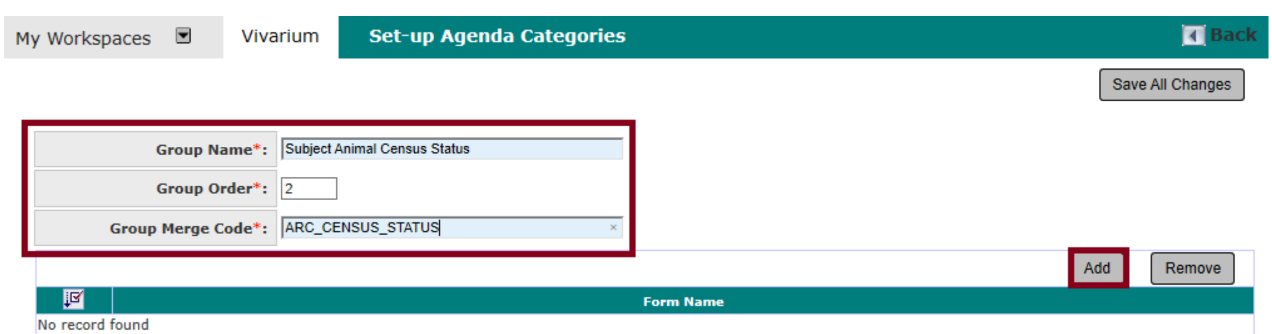
— **Group Name**: enter a descriptive name for the category; recall that categories are used when creating a finalized agenda document template, so the name entered here should indicate the contents of the category

— **Group Order**: the entry in this field is shown in the Group Display Order column of the **Set-up Agenda Categories** page, and dictates the order in which this category appears in the finalized agenda document template

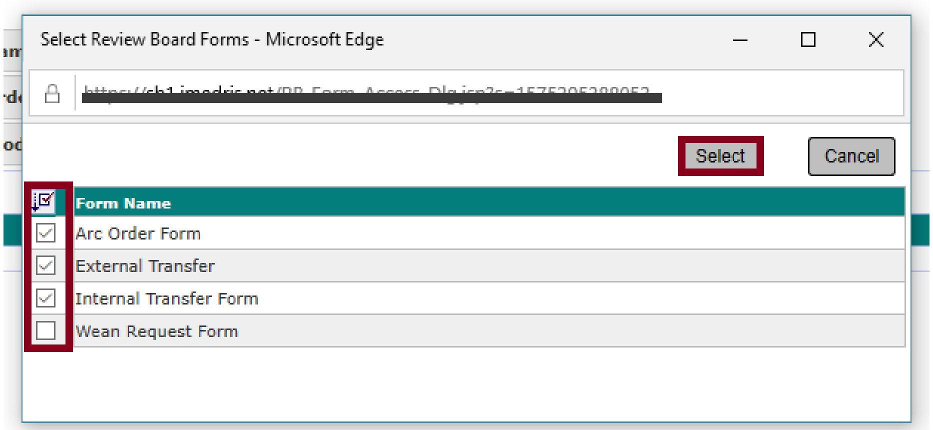
— **Group Merge Code**: enter the desired merge code to be used for inclusion of this category on forms and in document templates; *note that the code must include underscores where spaces occur between words, and cannot include any special characters (e.g., &, #, etc.)*

See the Using Merge Codes in Document Templates section of this manual for more information about working with merge codes.

An example of the filled fields is shown below. Click the **Add** button to attach forms to this category, if applicable.



The **Select Review Board Forms** popup appears, populated with all available forms for selection. *Note that because forms are custom configured for each institution, the list of forms shown here will vary.*

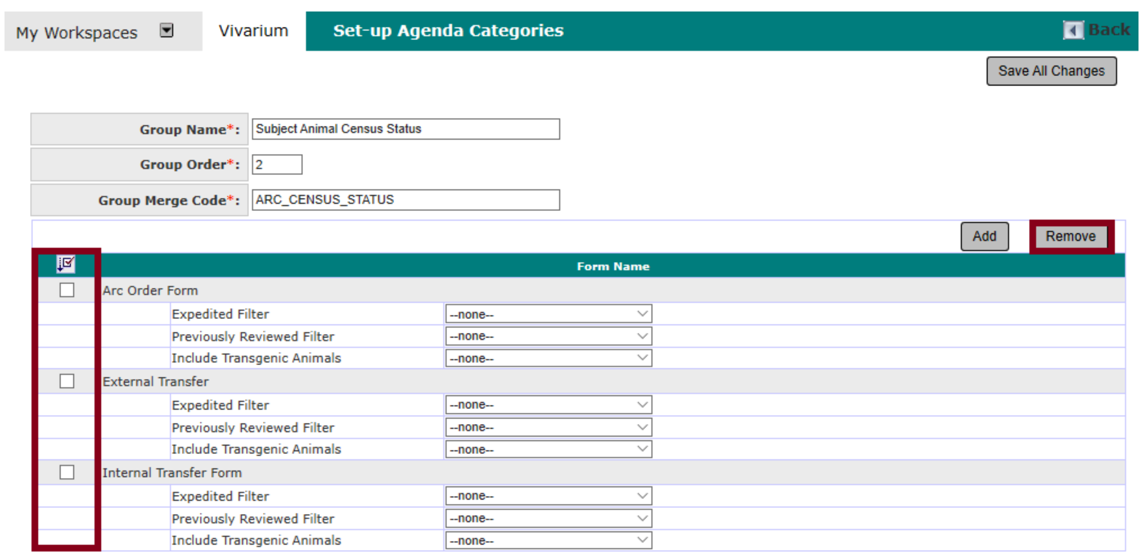


Click the **Cancel** button to close the popup without adding any forms to the category.

Select the checkbox(es) in the far-left column for forms to be attached to the category, then click the **Select** button.

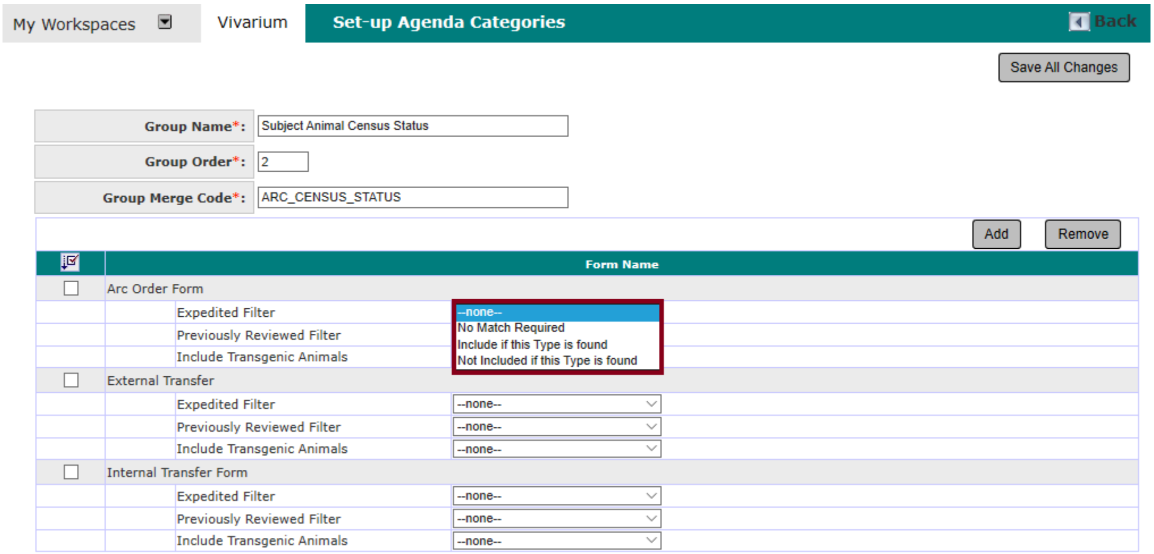
The selected form(s) is(are) added to the category add panel, with options to apply previously configured filters for each form if desired. *All* previously configured filters are shown here.

See the Agenda Filter section of this manual for more information about filter configuration.

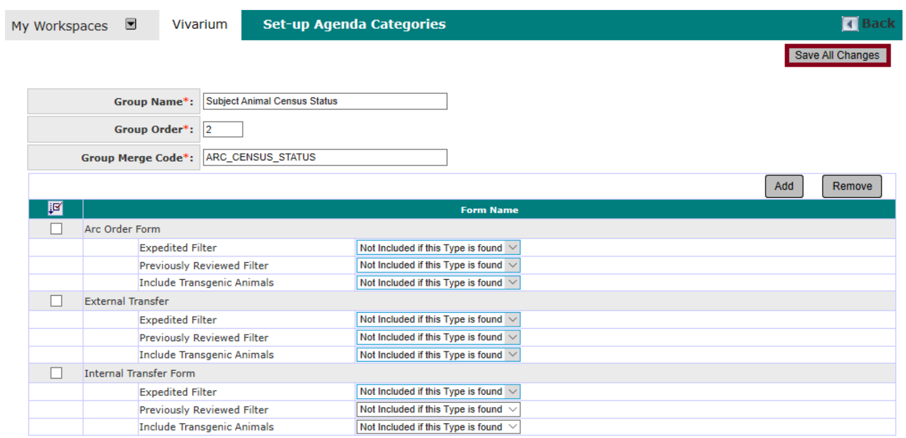


As shown in the screenshot above, select the checkbox(es) in the far-left column for any forms added to the category in error, then click the **Remove** button to remove the selected form(s).

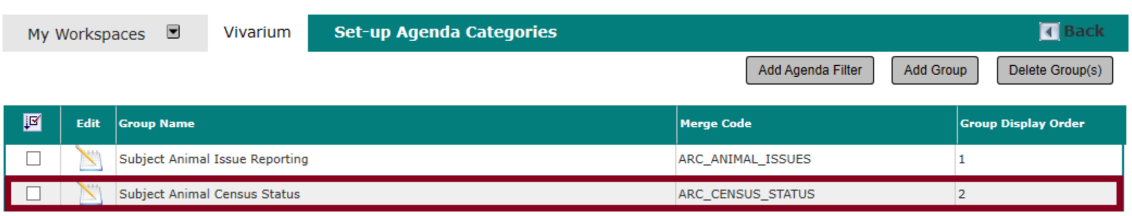
In the screenshot below, the dropdown list containing options for application of the “Expedited Filter” on the “Arc Order Form” item is expanded. This dropdown list is the same for all filters.



Make all desired selections in the filter option dropdown lists, then click the **Save All Changes** button. Note that a selection is required in every dropdown list in order to save the category.

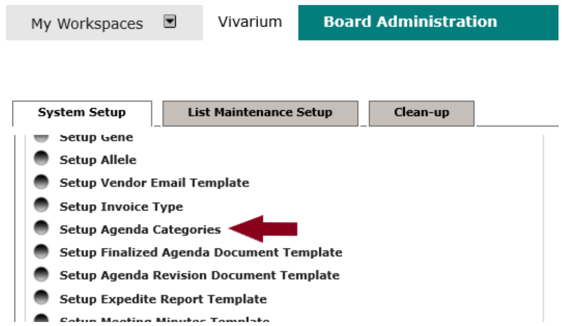


The category is added on the **Set-up Agenda Categories** page.

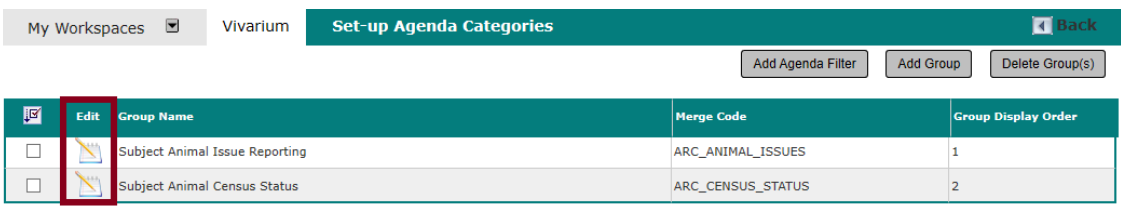


Edit Agenda Category

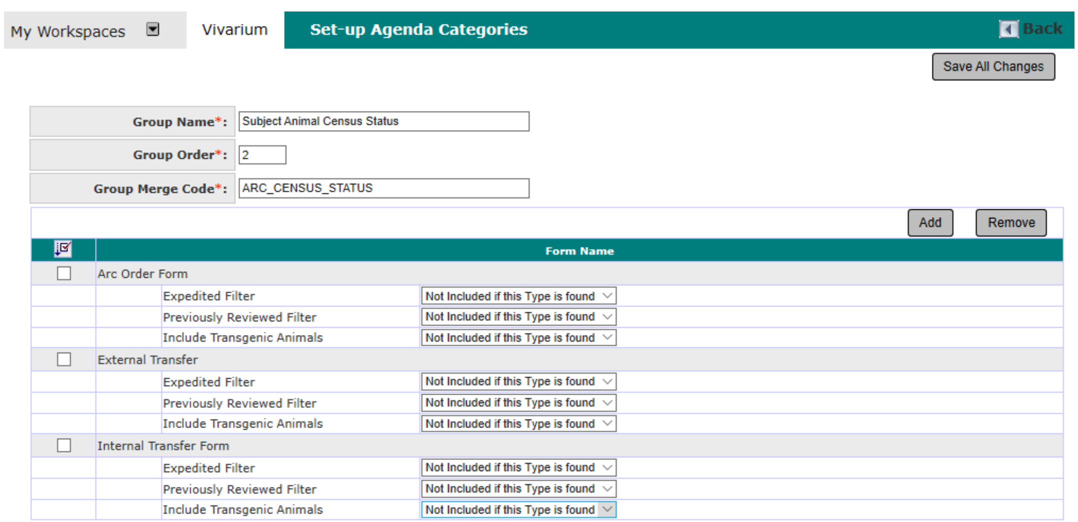
Click the **Setup Agenda Categories** link under Animal Resource Center > Review Board Administration > System Setup tab.



The **Set-up Agenda Categories** page opens, as shown below.



Click the icon in the **Edit** column for the applicable category. The category is opened for editing.



Make any desired changes to fields at the top of the edit panel as follows:

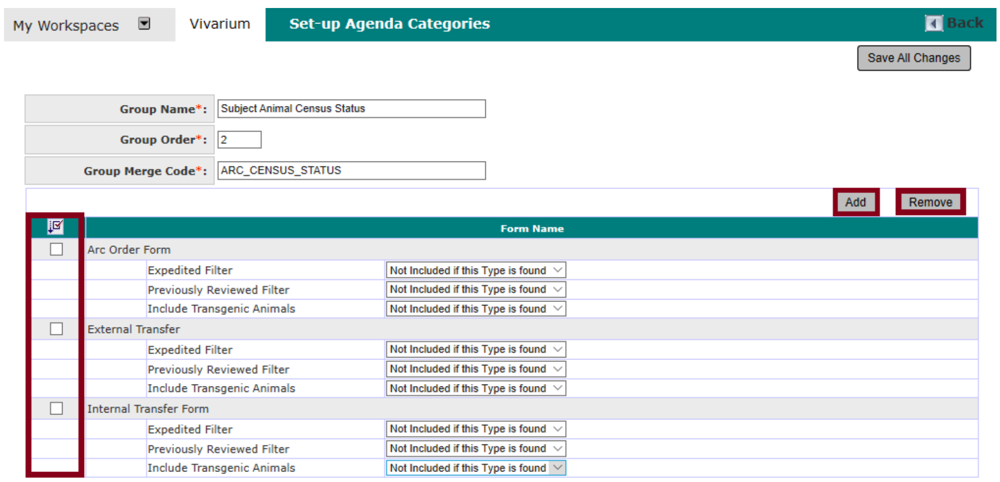
— **Group Name**: descriptive name for the category; recall that categories are used when creating a finalized agenda document template, so the name entered here should indicate the contents of the category

— **Group Order**: the entry in this field is shown in the Group Display Order column of the **Set-up Agenda Categories** page, and dictates the order in which this category appears in the finalized agenda document template

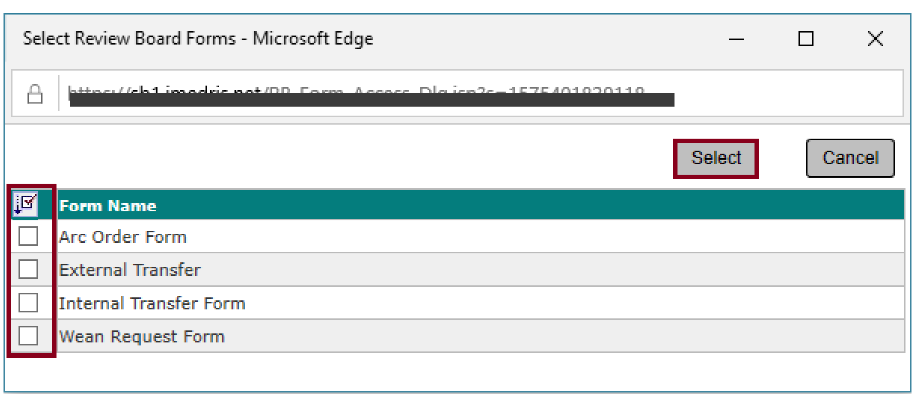
— **Group Merge Code**: enter the desired merge code to be used for inclusion of this category on forms and in document templates; *note that the code must include underscores where spaces occur between words, and special characters (e.g., &, #, etc.) are not allowed*

See the Using Merge Codes in Document Templates section of this manual for more information about working with merge codes.

As shown in the screenshot below, select the checkbox(es) in the far-left column for any forms to be removed from the category, then click the **Remove** button to remove the selected form(s).



Click the **Add** button to attach forms to this category, if applicable. The **Select Review Board Forms** popup appears, populated with all available forms for selection. *Note that because forms are custom configured for each institution, the list of forms shown here will vary.*

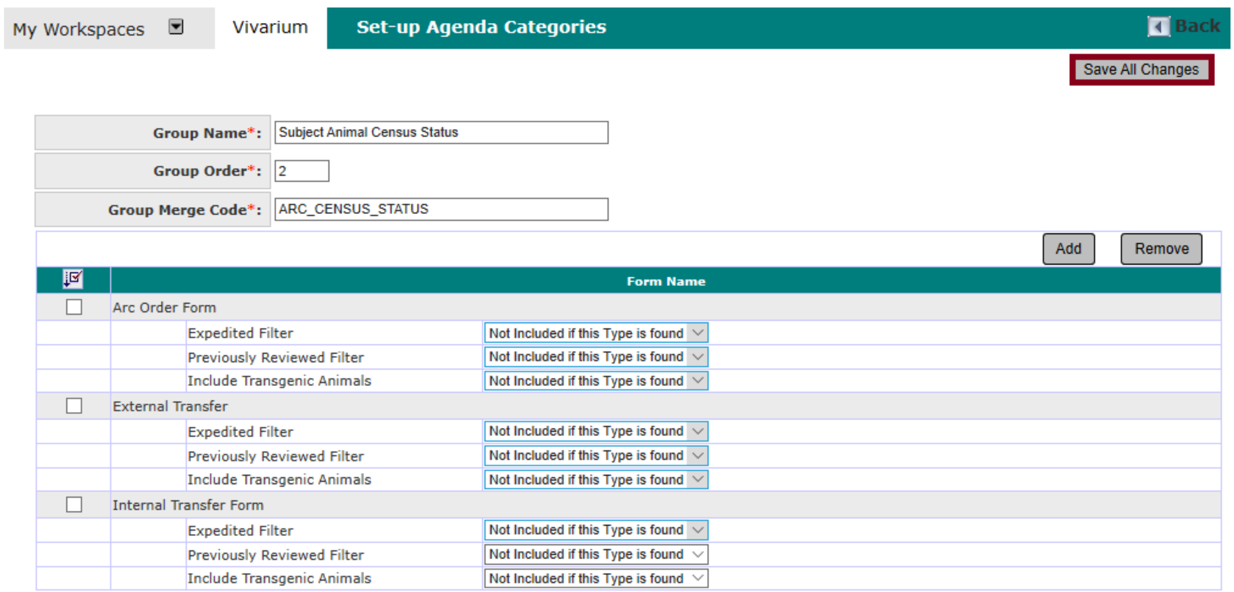


Click the **Cancel** button to close the popup without adding any forms to the category.

Select the checkbox(es) in the far-left column for forms to be attached to the category, then click the **Select** button.

Any selected form(s) is(are) added to the category add panel, with options to apply previously configured filters for each form if desired. *All* previously configured filters are shown here.

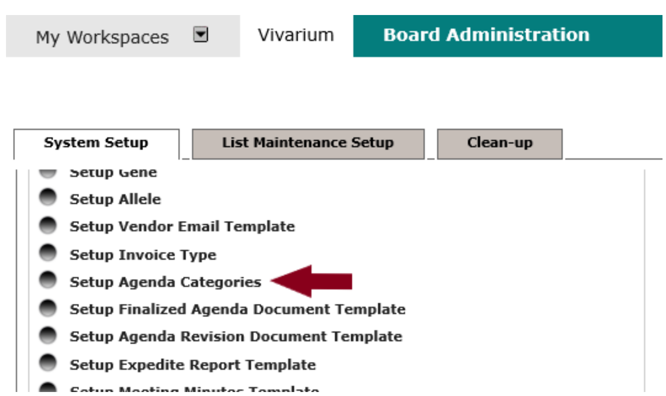
See the Agenda Filter section of this manual for more information about filter configuration.



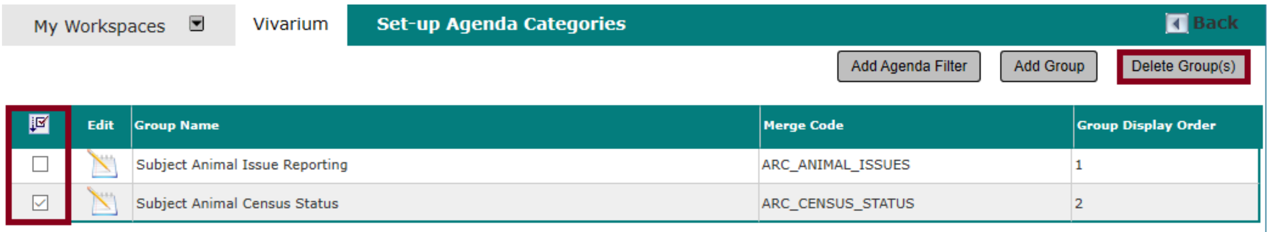
When all desired changes to the category are complete, click the **Save All Changes** button to save changes and close the edit panel.

Delete Agenda Category

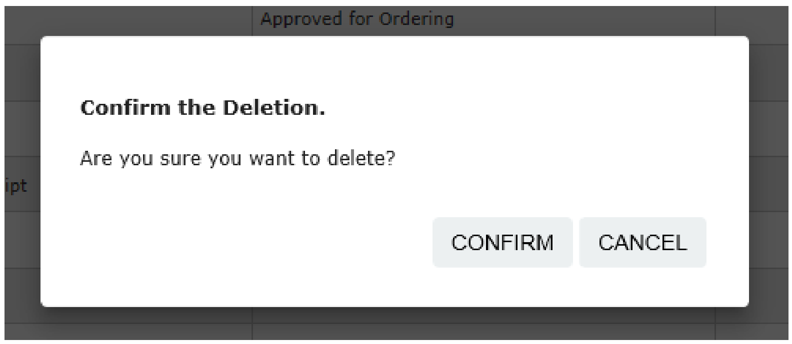
Click the **Setup Agenda Categories** link under Animal Resource Center > Review Board Administration > System Setup tab.



The **Set-up Agenda Categories** page opens, as shown below.

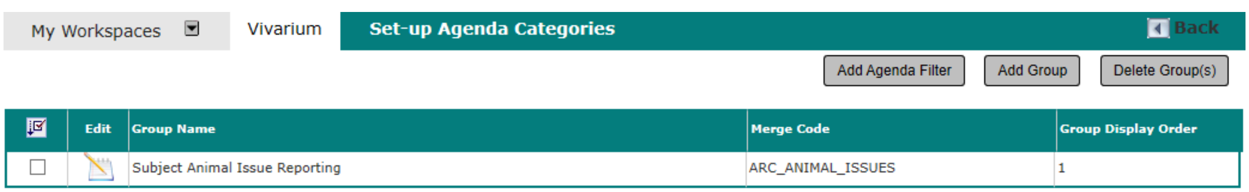


Select the checkbox in the far-left column for the applicable category(ies), then click the **Delete Group(s)** button. A confirmation popup window displays.



Click **CANCEL** to return to the **Set-up Agenda Categories** page without deleting the category(ies).

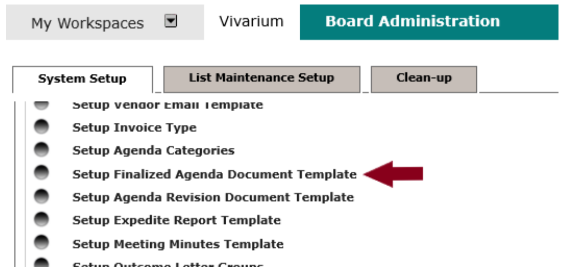
Click **CONFIRM** to delete the category(ies) and return to the **Set-up Agenda Categories** page. The category is deleted.



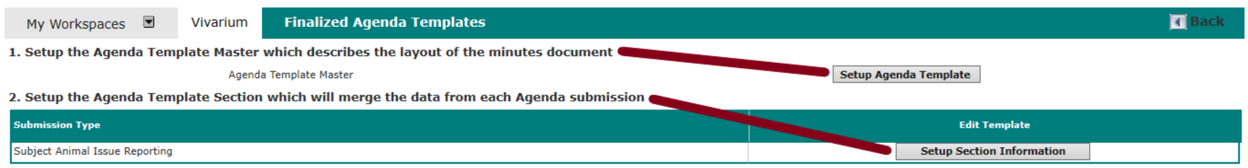
Setup Finalized Agenda Document Template

The iRIS™ system provides the ability to configure finalized meeting agenda templates that include commonly used boilerplate text and can automatically pull a variety of system data into the agenda when it is generated.

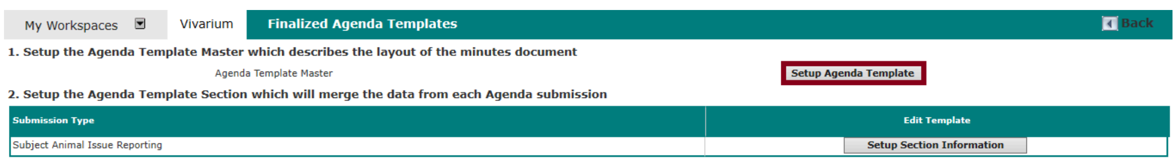
This functionality is provided on the **Finalized Agenda Templates** page. To access the page, click the **Setup Finalized Agenda Document Template** link under Animal Resource Center > Review Board Administration > System Setup tab.



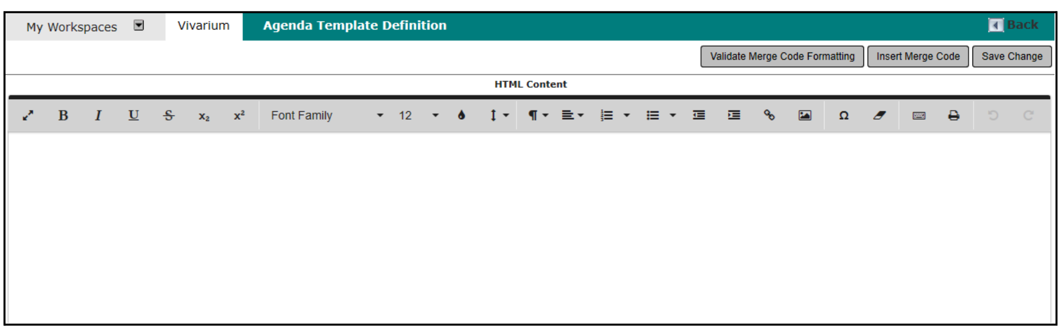
The **Finalized Agenda Templates** page opens, as shown below. Notice the two instruction items and the corresponding buttons for each.



As indicated in the instructions, the first step is setting up the Agenda Template Master. Click the **Setup Agenda Template** button to begin.

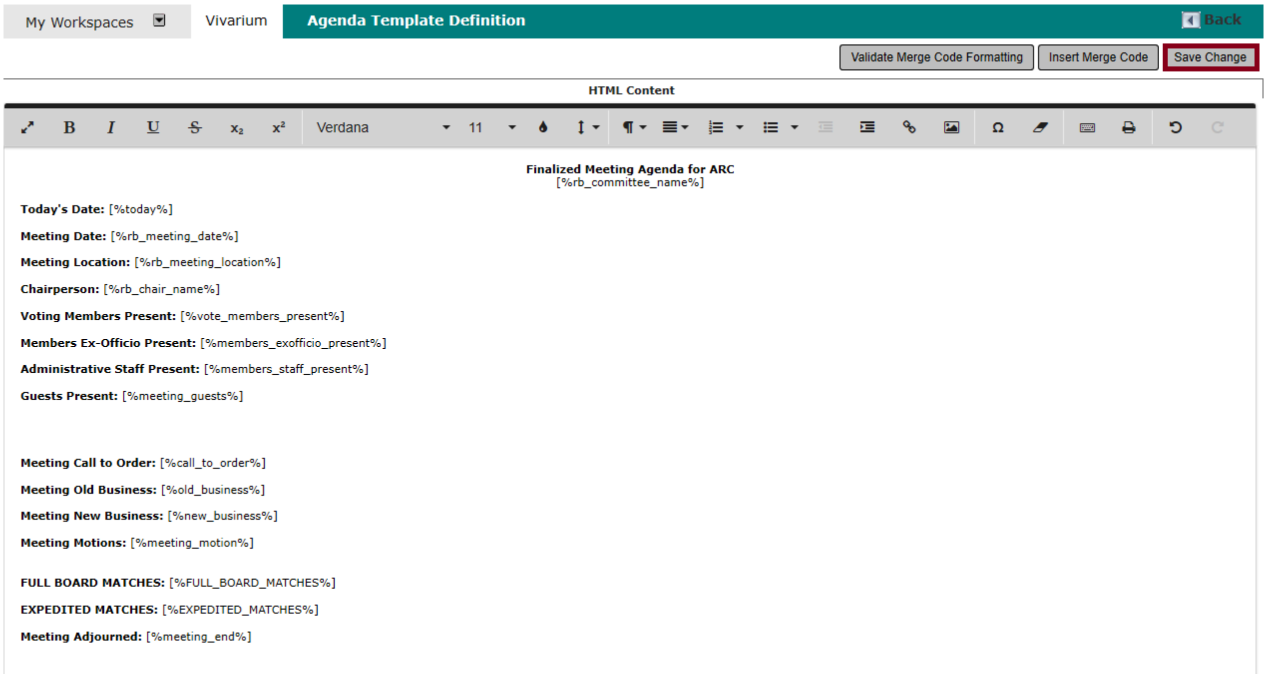


The **Agenda Template Definition** text editor page opens, as shown below.



Enter desired boilerplate text and Merge Codes and apply formatting as desired using the provided rich text editor toolbar. See the Using Merge Codes in Document Templates section of this manual for more information about working with Merge Codes.

Recall that this template will serve as the basis for all finalized agenda documents, and therefore it should include all items considered standard and necessary to any finalized agenda. An example of a completed finalized agenda template is shown below.

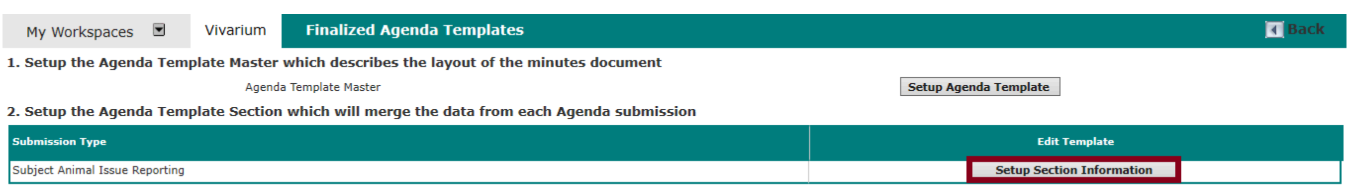


When template content is complete, click the **Save Change** button to close the page and save the template.

Back on the **Finalized Agenda Templates** page, any previously configured, custom agenda category sections are listed in the lower section of the screen. Each section can be configured to specify what information is to be displayed for each submission in the agenda template master.

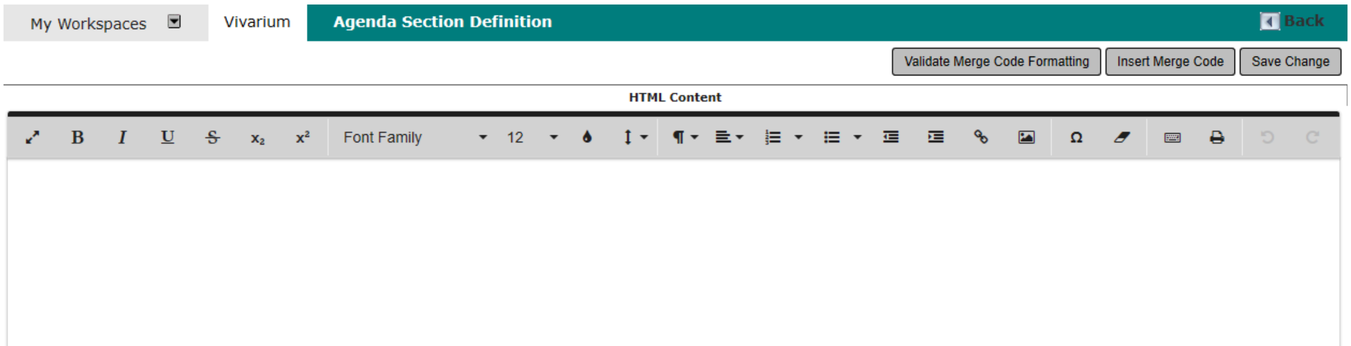
Note that custom agenda category configuration includes a study/protocol/project selection component that automatically limits review items pulled into the meeting to those matching specific criteria. Adding a custom category to the agenda does not pull all animal study/protocol/project items into the meeting.

See the Setup Agenda Categories section of this manual for more information about configuration of custom agenda categories.

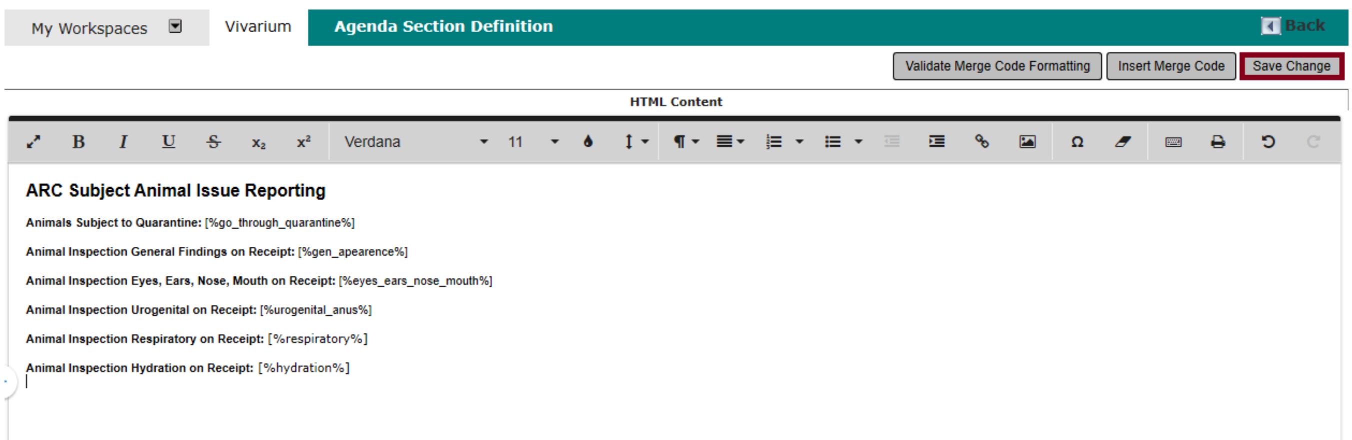


Again, recall that the template will serve as the basis for *all* finalized agenda documents; custom agenda categories should only be added to the template if those categories are applicable to most meeting agendas.

Click the **Setup Section Information** button for any agenda category to be added to the finalized agenda template. The **Agenda Section Definition** page opens, as shown below.



The boilerplate text and Merge Codes entered here depend on the purpose of the agenda category. In this example the category is intended to add animal issue reporting to the meeting, so its content is focused on changes in animal life status and population counts. An example of a completed section definition is shown below.



When section definition content is complete, click the **Save Change** button to close the page and save the section definition.

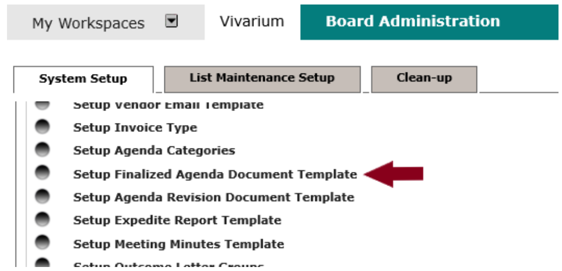
Going forward, each ARC Meeting Agenda generated for a specific meeting date will consist of one document that includes both the Agenda Template Master and any custom sections configured as above.

See the IACUC – Meeting Agenda, Minutes, and Meeting Manager manual for more information about meeting functionality in iRIS™.

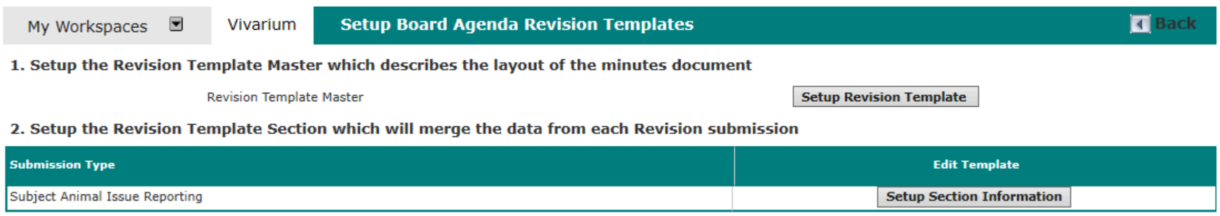
Setup Agenda Revision Document Template

The Revision Agenda Template is used to generate an addendum when a new submission is placed on the agenda *after* the initial Agenda is published for a given meeting date.

This functionality is provided on the **Finalized Agenda Templates** page. To access the page, click the **Setup Agenda Revision Document Template** link under Animal Resource Center > Review Board Administration > System Setup tab.



The **Setup Board Agenda Revision Templates** page opens, as shown below.



Notice that this page is nearly identical to the Finalized Agenda Templates page, with the exception that where the Finalized Agenda Templates page is used to configure the Agenda Template Master, this page is used to configure the Revision Template Master.

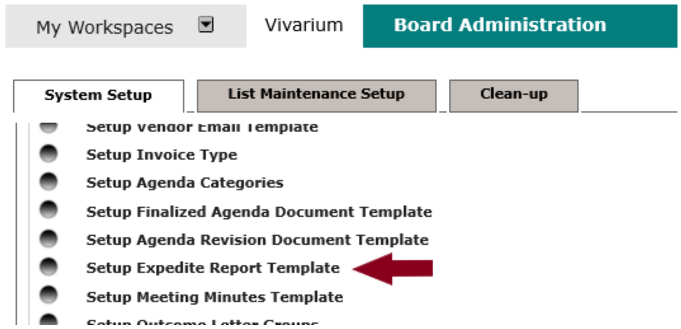
Where this feature is in use it is often necessary for the institution to configure applicable agenda categories to capture the most common agenda revision scenarios and related, pertinent data. See the Setup Agenda Categories section of this manual for more information about configuration of custom agenda categories.

The process of configuring the Revision Template Master is the same as that for configuration of the Agenda Template Master. See the Setup Finalized Agenda Document Template section of this manual for details of template configuration.

Setup Expedite Report Template

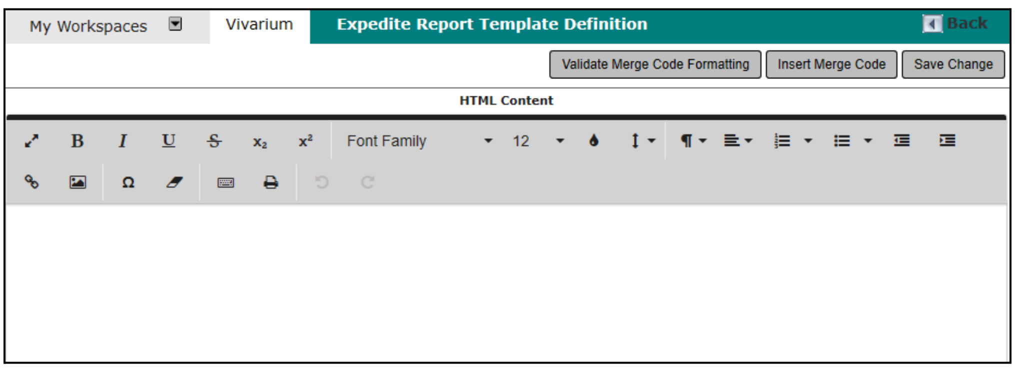
At institutions where the review board property rb.use_expedited_report is set to "Yes" within the Meeting Settings group, it is possible to generate a summary of expedited reports for attachment to a meeting date.

This functionality is provided on the **Setup Expedite Report Templates** page. To access the page, click the **Setup Expedite Report Template** link under Animal Resource Center > Review Board Administration > System Setup tab.



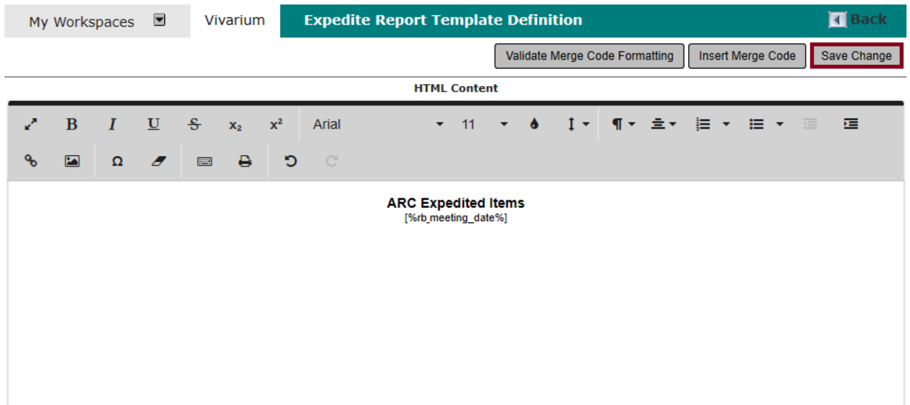
The **Setup Expedite Report Templates** page opens, as shown below.

Click the **Setup Template** button. The **Expedite Report Template Definition** text editor page opens, as shown below.



Enter desired boilerplate text and Merge Codes and apply formatting as desired using the provided rich text editor toolbar. See the Using Merge Codes in Document Templates section of this manual for more information about working with Merge Codes.

An example of a completed expedite report template is shown below.



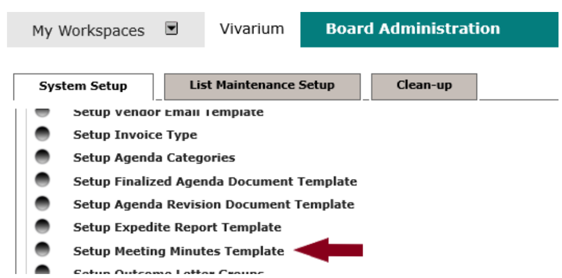
When template content is complete, click the **Save Change** button to close the page and save the template.

See the IACUC – Meeting Agenda, Minutes, and Meeting Manager manual for more information about generation of the expedited report as it relates to meeting functionality in iRIS™.

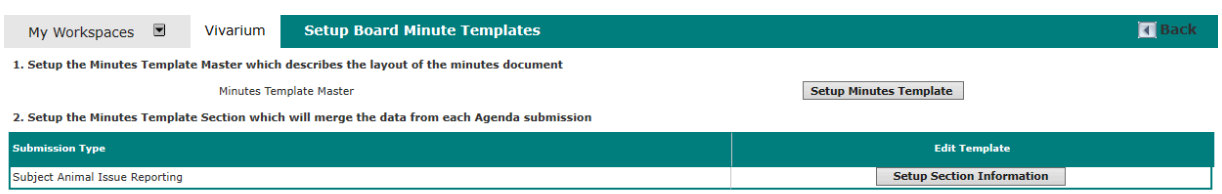
Setup Meeting Minutes Template

The Meeting Minutes Template is used to generate a standardized minutes document for a given meeting date.

This functionality is provided on the **Setup Board Minute Templates** page. To access the page, click the **Setup Meeting Minutes Template** link under Animal Resource Center > Review Board Administration > System Setup tab.



The **Setup Board Minute Templates** page opens, as shown below.



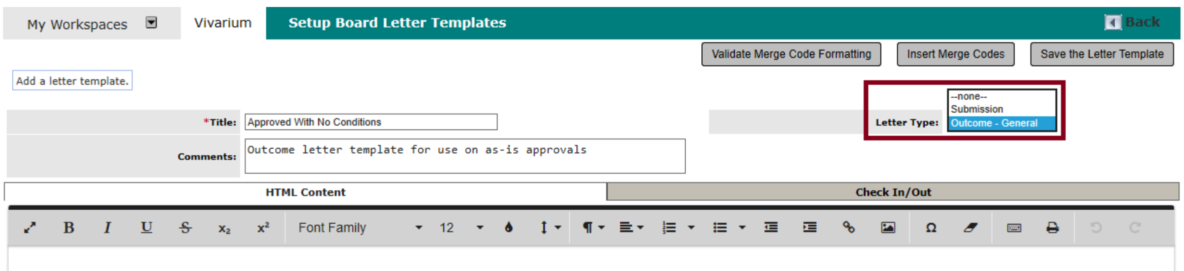
Notice that this page is nearly identical to the Finalized Agenda Templates page, with the exception that where the Finalized Agenda Templates page is used to configure the Agenda Template Master, this page is used to configure the Minutes Template Master.

The process of configuring the Minutes Template Master is the same as that for configuration of the Agenda Template Master. See the Setup Finalized Agenda Document Template section of this manual for details of template configuration.

Setup Outcome Letter Groups

The iRIS™ system allows for collecting sets of review board forms into custom configured **Letter Type** groups for assignment to different board review types.

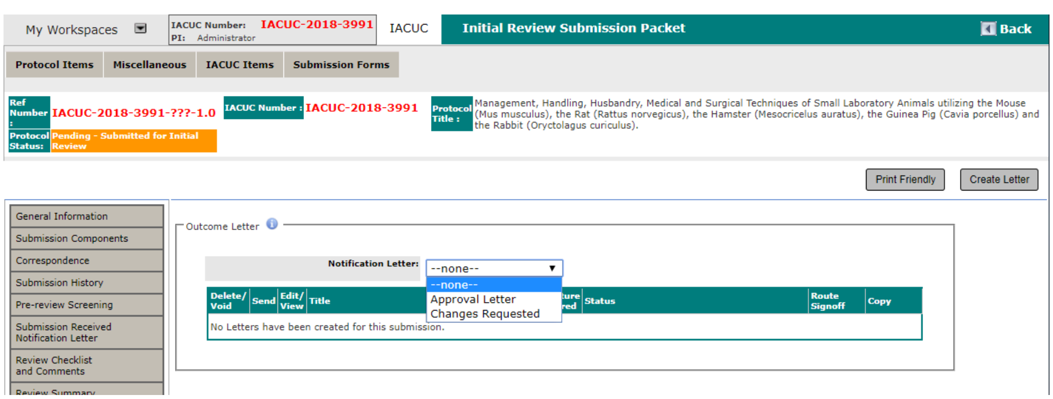
As shown below, the **Letter Types** list on the add/edit panel of the **Setup Board Letter Templates** page (see the Setup Outcome Letter Templates section of this manual) includes two default entries:



— **Outcome - General**: letter templates of this type appear as options available for selection on the Outcome Letter tab of submission processing screens

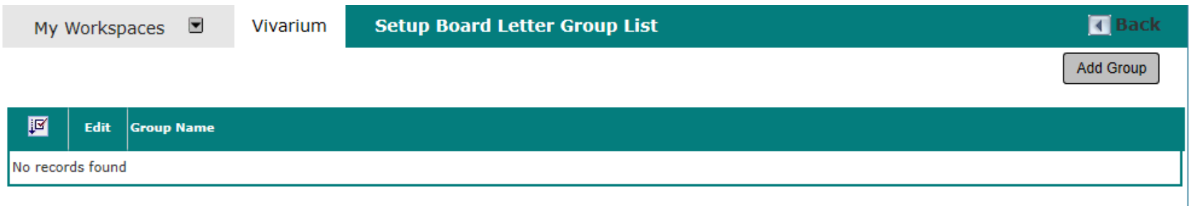
Note: filters assigned to custom outcome letter groups determine those groups' availability in the dropdown list on the Outcome Letter tab, but the Outcome – General Group is always be available. For example, a letter associated to a group called "Outcome – Full Renewal Approval" that has a filter assigning that group to the Full Renewal Submission type would only be available for a Full Renewal Submission type, this letter would not be available for any other submission type.

— **Submission**: letter templates of this type appear as options available for selection on the Submission Received Notification Letter tab of submission processing screens (shown below)



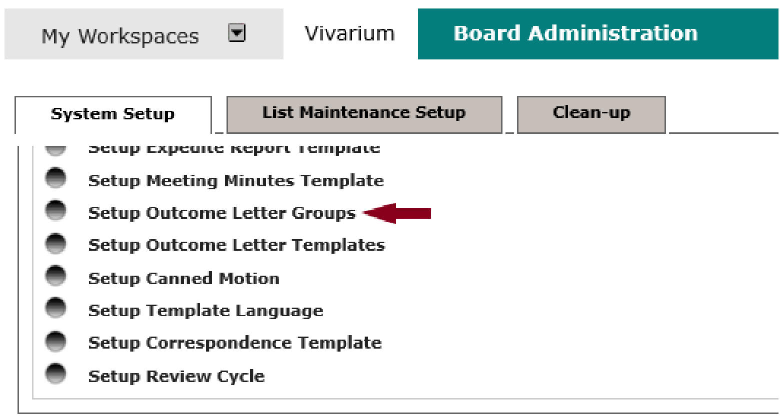
Custom configured **Letter Type** groups are added to the **Letter Type** dropdown list on the **Setup Board Letter Templates** page (shown in the first screenshot above), and are optionally made available on the Outcome Letter tab of submission processing screens according to rules established at the time a **Letter Type** group is created or revised (see Add Outcome Letter Group and Edit Outcome Letter Group subsections of this manual, below).

Letter Type groups are configured on the **Setup Board Letter Group List** page, shown below.

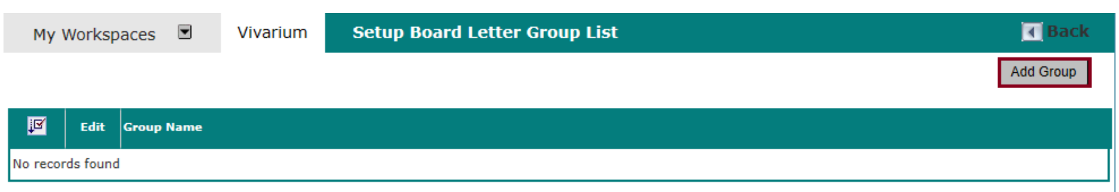


Add Outcome Letter Group

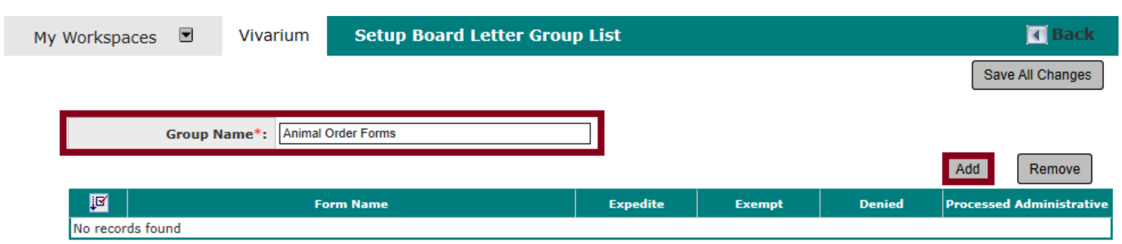
Navigate to Animal Resource Center > Review Board Administration > System Setup Tab > **Setup Outcome Letter Groups** link.



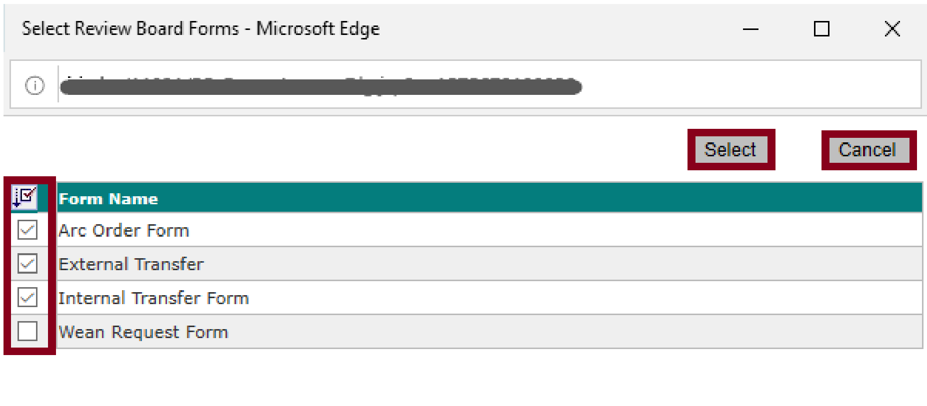
The **Setup Board Letter Group List** page opens. Click the **Add Group** button.



An add panel is opened for creation of the group. Enter the desired **Group Name**, as shown below, then click the **Add** button at right.

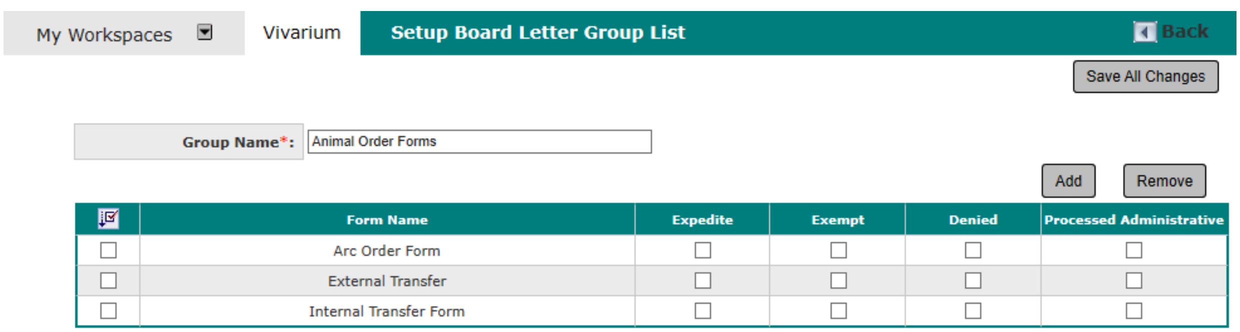


A popup opens for selection of review board forms to be included in the group. *Note that because forms are custom configured for each institution, the list of forms shown here will vary.*

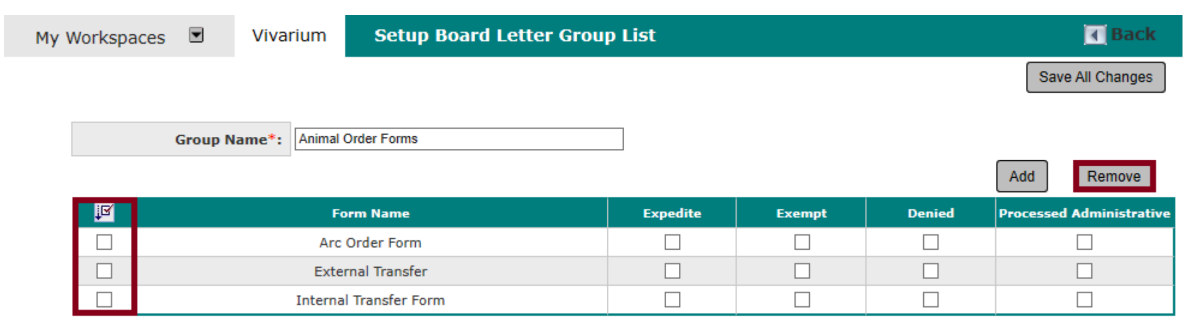


Click the **Cancel** button to close the popup without adding any forms to the group.

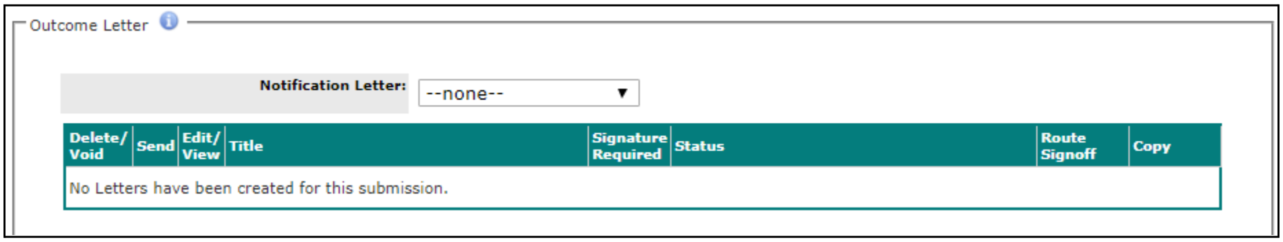
Select the checkbox(es) in the far-left column for all forms to be included in the group, then click the **Select** button to add them to the group and close the popup. As shown below, the selected forms are added to the list of forms on the add panel.



If any forms were selected from the popup list in error, select the checkbox(es) for any forms to be removed from the group and click the **Remove** button.

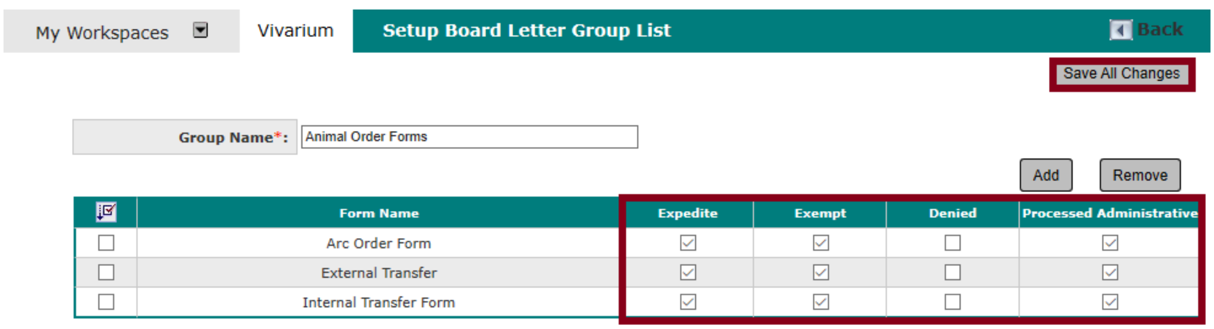


Select or de-select the applicable checkboxes to make each form listed available/unavailable as part of the group according to board review type when the group is selected in the **Notification Letter** dropdown list in the Outcome Letter section of submission processing screens (shown below).

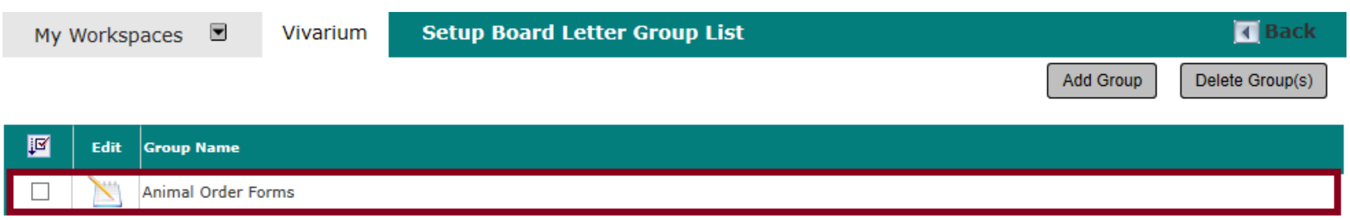


Note that all forms in the group are made available to the Full Board Review type by default.

An example of the fully configured group is shown in the screenshot below.



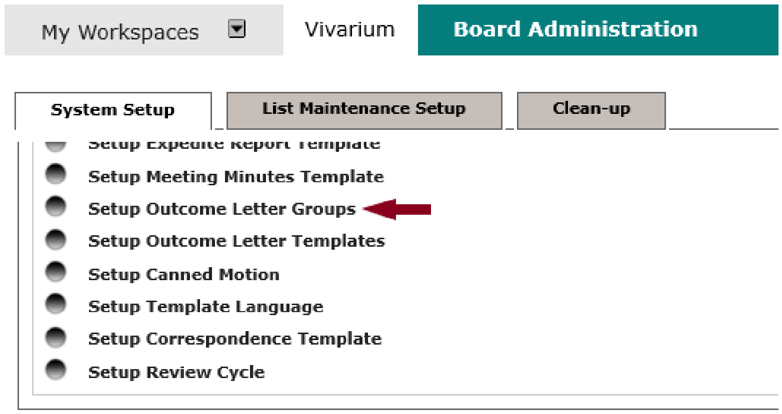
Click the **Save All Changes** button to save the new group. As shown below, the group is added on the **Setup Board Letter Group List** page.



The new **Letter Type** group is also added to the **Letter Type** dropdown list on the **Setup Board Letter Templates** page and is made available on the Outcome Letter tab of submission processing screens for **Expedite**, **Exempt** and **Process Administratively** board review types.

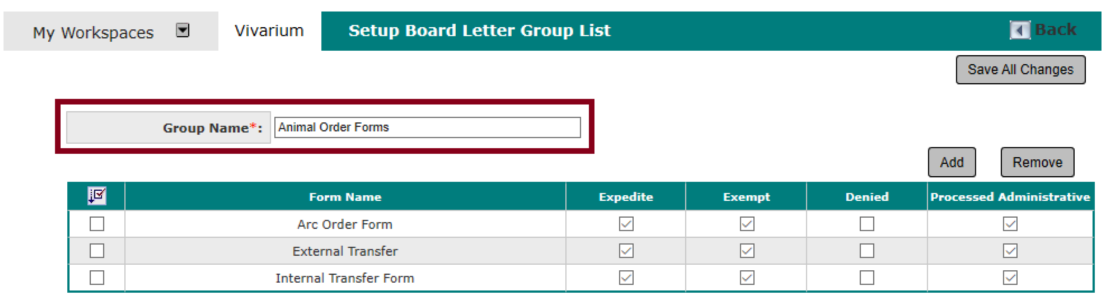
Edit Outcome Letter Group

Navigate to Animal Resource Center > Review Board Administration > System Setup Tab > **Setup Outcome Letter Groups** link.

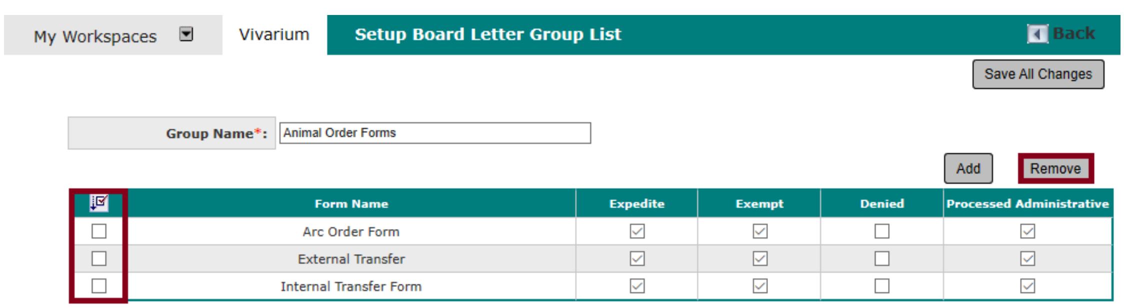


The **Setup Board Letter Group List** page opens. Click icon in the **Edit** column for the applicable group.

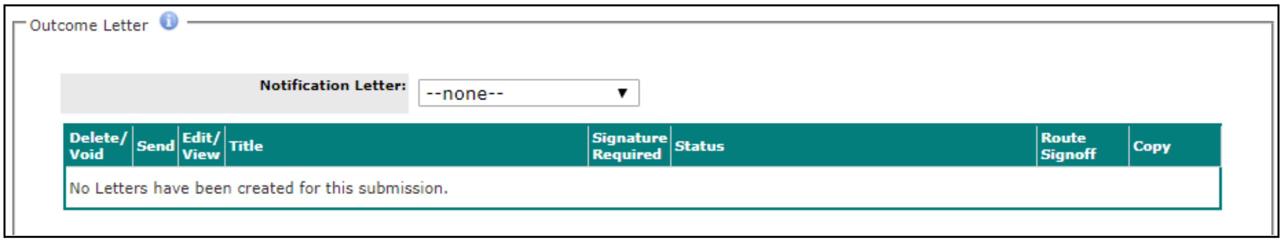
The group is opened for editing. Make any desired changes to the **Group Name**.



To remove forms from the group, select the applicable checkbox(es) in the far-left column and click the **Remove** button.



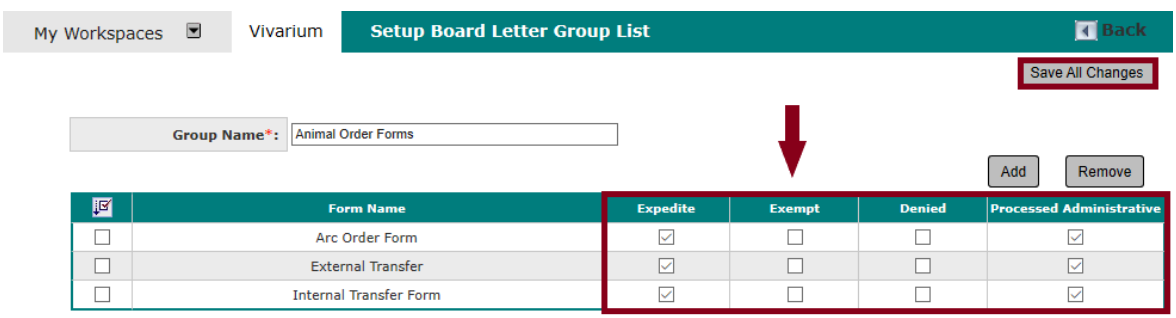
Select or de-select the applicable checkboxes to make each form listed available/unavailable as part of the group according to board review type when the group is selected in the **Notification Letter** dropdown list in the Outcome Letter section of submission processing screens (shown below).



Note that all forms in the group are made available to the Full Board Review type by default.

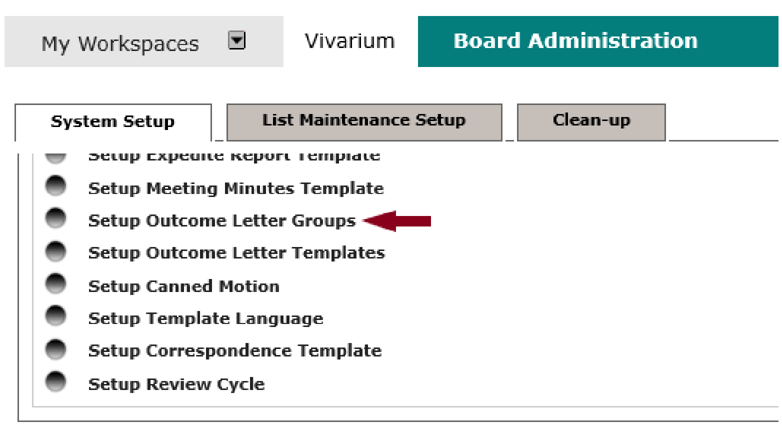
In the example screenshot below, checkboxes for the **Exempt** board review type are de-selected. Applying this change means that the forms shown will not be included in the Animal Order Forms group when it is selected from the **Notification Letter** dropdown list (see screenshot above) for submissions assigned to the **Exempt** board review type.

Click the **Save All Changes** button to save changes and close the edit panel.



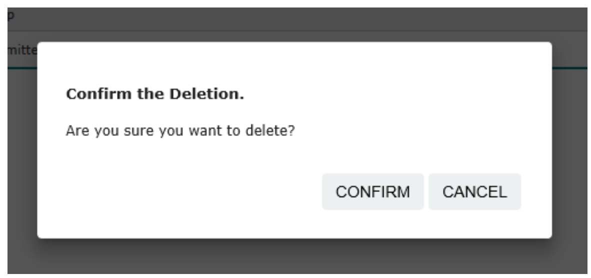
Delete Outcome Letter Group

Navigate to Animal Resource Center > Review Board Administration > System Setup Tab > **Setup Outcome Letter Groups** link.



The **Setup Board Letter Group List** page opens. Select the checkbox(es) for the group(s) to be deleted and click the **Delete Group(s)** button.

A confirmation popup displays.



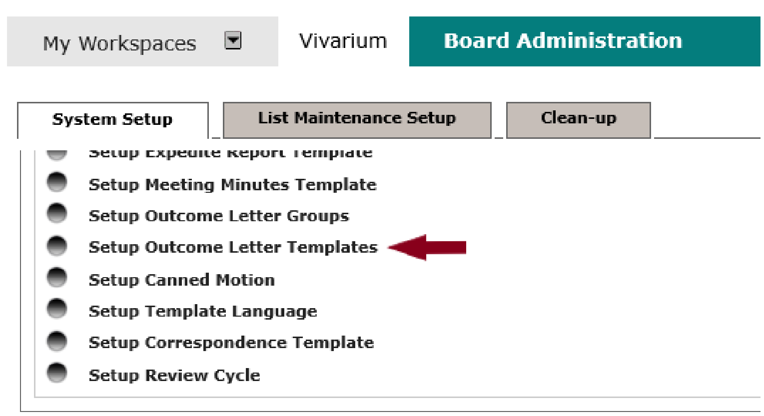
Click the **CANCEL** button to return to the **Setup Board Letter Group List** page without deleting the selected template(s).

Click the **CONFIRM** button to confirm the deletion and return to the **Setup Board Letter Group List** page.

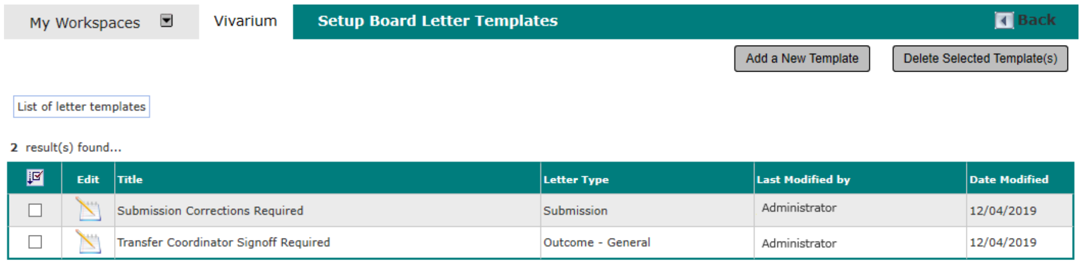
Setup Outcome Letter Templates

The iRIS™ system provides the ability to configure standardized outcome letter templates that include commonly used boilerplate text and can automatically pull a variety of system data into the letters when they are generated.

This functionality is provided on the **Setup Board Letter Templates** page. To access the page, click the **Setup Outcome Letter Templates** link under Animal Resource Center > Review Board Administration > System Setup tab.

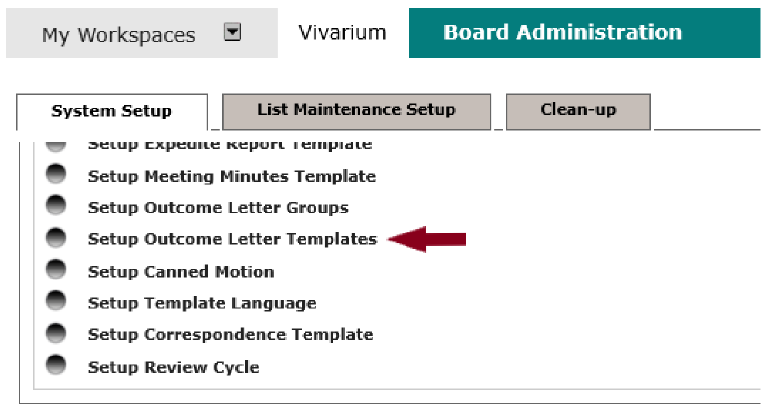


The **Setup Board Letter Templates** page opens, as shown below.

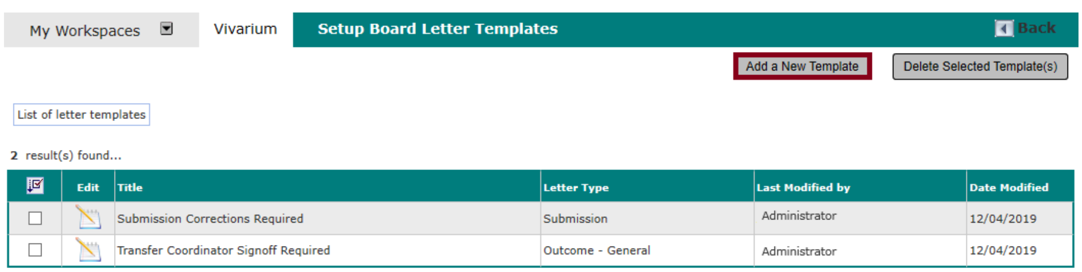


Add Outcome Letter Template

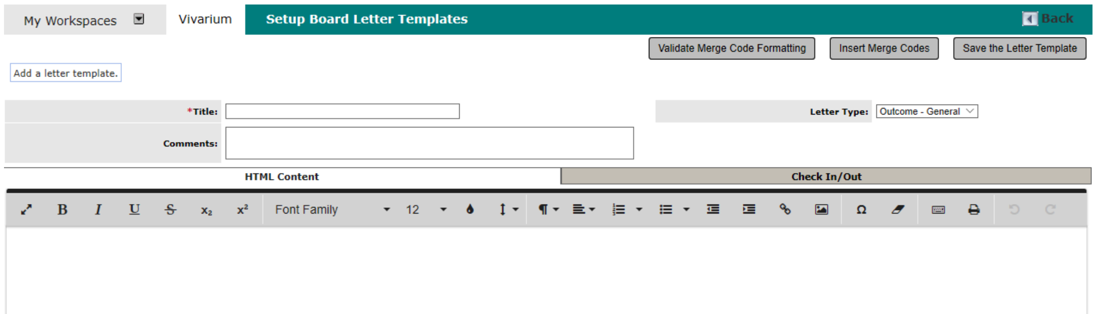
Navigate to Animal Resource Center > Review Board Administration > System Setup tab > **Setup Outcome Letter Templates** link.



The **Setup Board Letter Templates** page opens, as shown below.



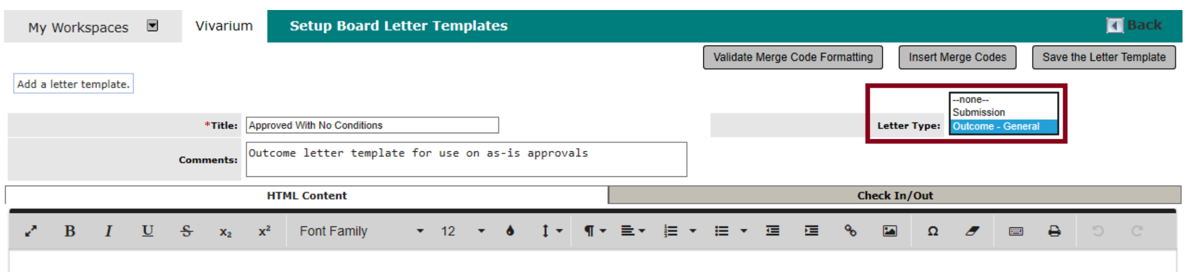
Click the **Add a New Template** button. As shown below, the Add a letter template panel opens for creation of the new letter.



Enter the desired **Title** and **Comments**, then click in the **Letter Type** field and click to select an item in the dropdown list. As shown below, the list includes two default entries:

— **Outcome - General**: letter templates of this type appear as options available for selection on the Outcome Letter tab of submission processing screens

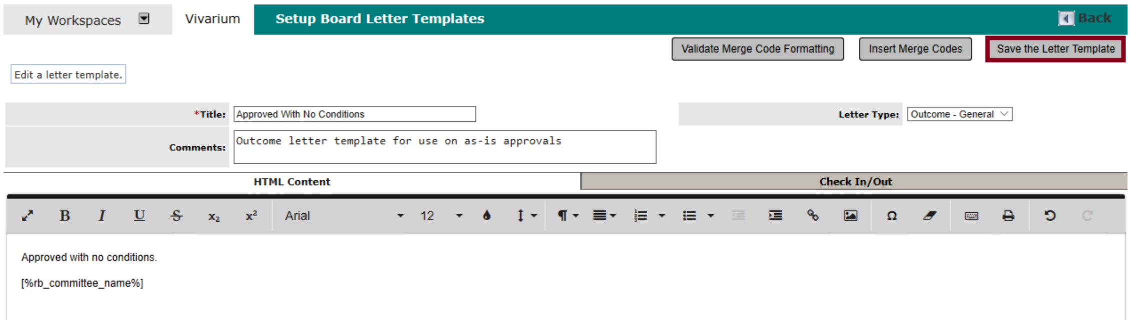
— **Submission**: letter templates of this type appear as options available for selection on the Submission Received Notification Letter tab of submission processing screens



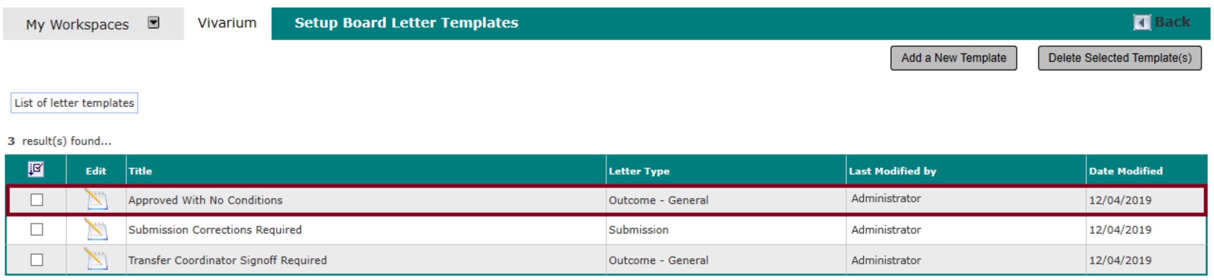
*Note that any letter types configured via the Setup Outcome Letter Groups function are added to the **Letter Type** dropdown list. When a custom configured letter type is selected, the associated letter template's inclusion as an option available for selection on the Outcome Letter tab of submission processing screens is dictated by rules established when the Letter Group is created. See the Setup Outcome Letter Groups section of this manual for more information about configuring Letter Groups.*

Enter desired text and Merge Codes in the main text editor window. See the Using Merge Codes in Document Templates section of this manual for more information about working with Merge Codes.

Apply any desired formatting, then click the **Save the Letter Template** button.

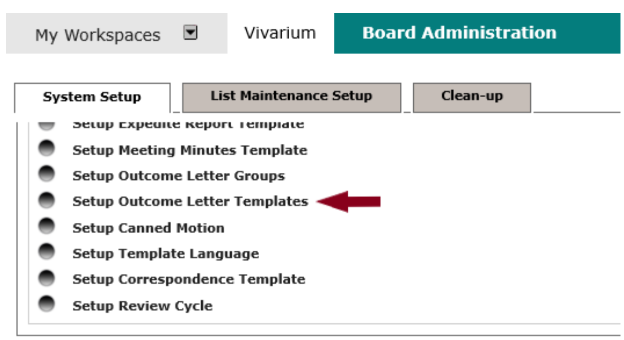


The template is added on the **Setup Board Letter Templates** page.

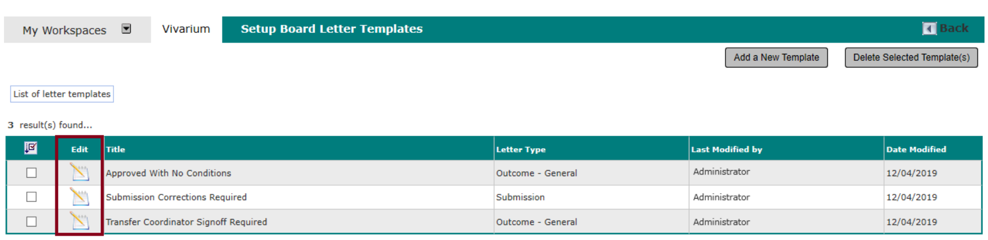


Edit Outcome Letter Template

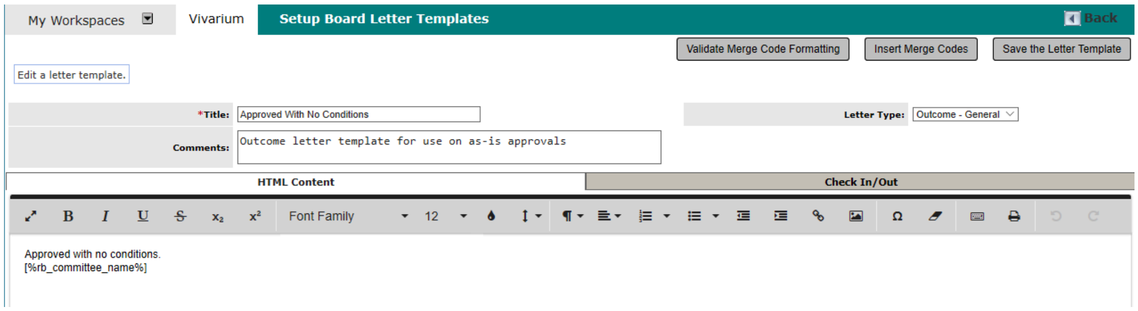
Navigate to Animal Resource Center > Review Board Administration > System Setup tab > **Setup Outcome Letter Templates** link.



The **Setup Board Letter Templates** page opens, as shown below. Click the icon in the **Edit** column for the applicable template.



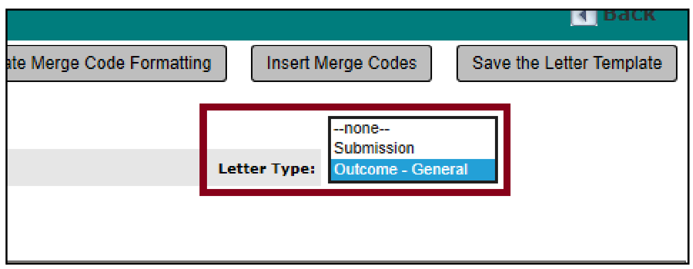
As shown below, the template is opened for editing in an Edit a letter template panel.



Make desired changes to the **Title**, **Comments** and **Letter Type** fields. The **Letter Type** list includes two default entries:

— **Outcome - General**: letter templates of this type appear as options available for selection on the Outcome Letter tab of submission processing screens

— **Submission**: letter templates of this type appear as options available for selection on the Submission Received Notification Letter tab of submission processing screens

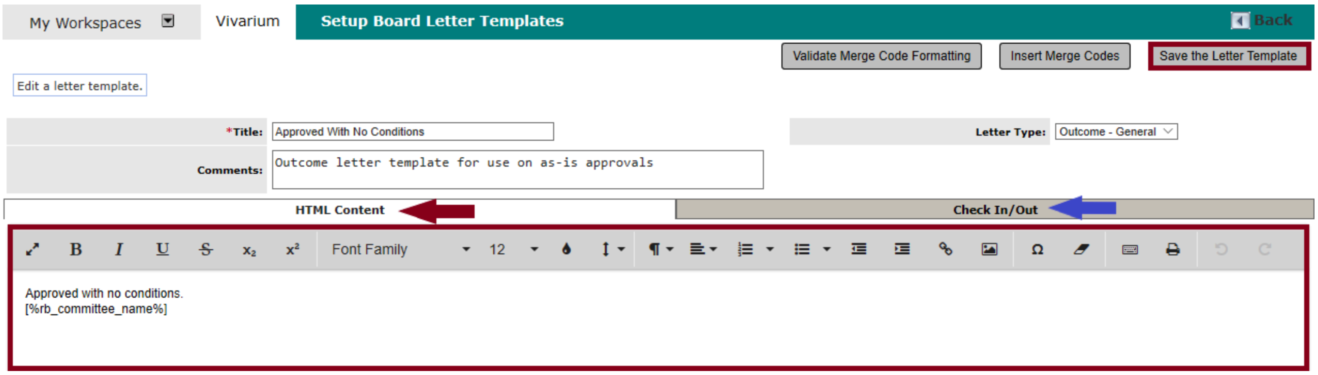


*Note that any letter types configured via the Setup Outcome Letter Groups function are added to the **Letter Type** dropdown list. When a custom configured letter type is selected, the associated letter template's inclusion as an option available for selection on the Outcome Letter tab of submission processing screens is dictated by rules established when the Letter Group is created. See the Setup Outcome Letter Groups section of this manual for more information about configuring Letter Groups.*

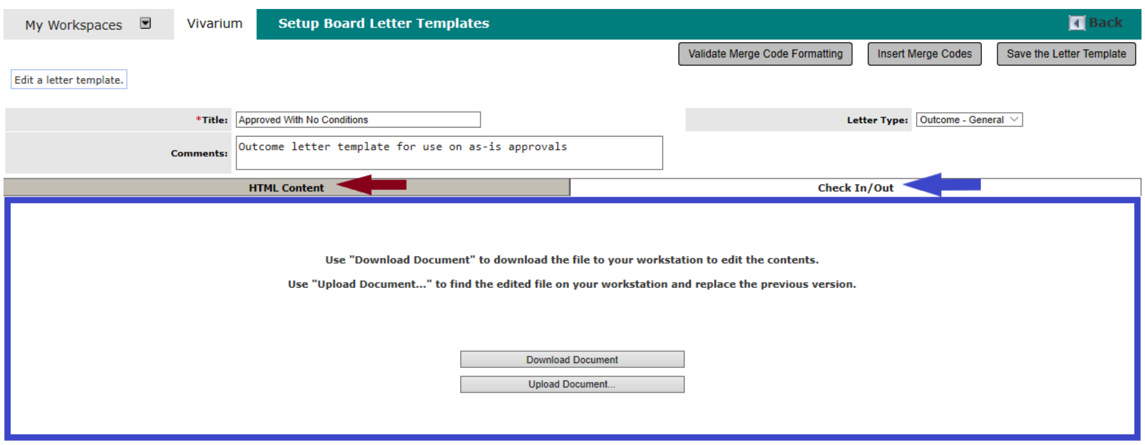
The two tabs in the lower part of the edit panel offer two different methods for revising the template's content.

As shown below, the **HTML Content** tab (red arrow and box) allows for direct editing in the text editor window.

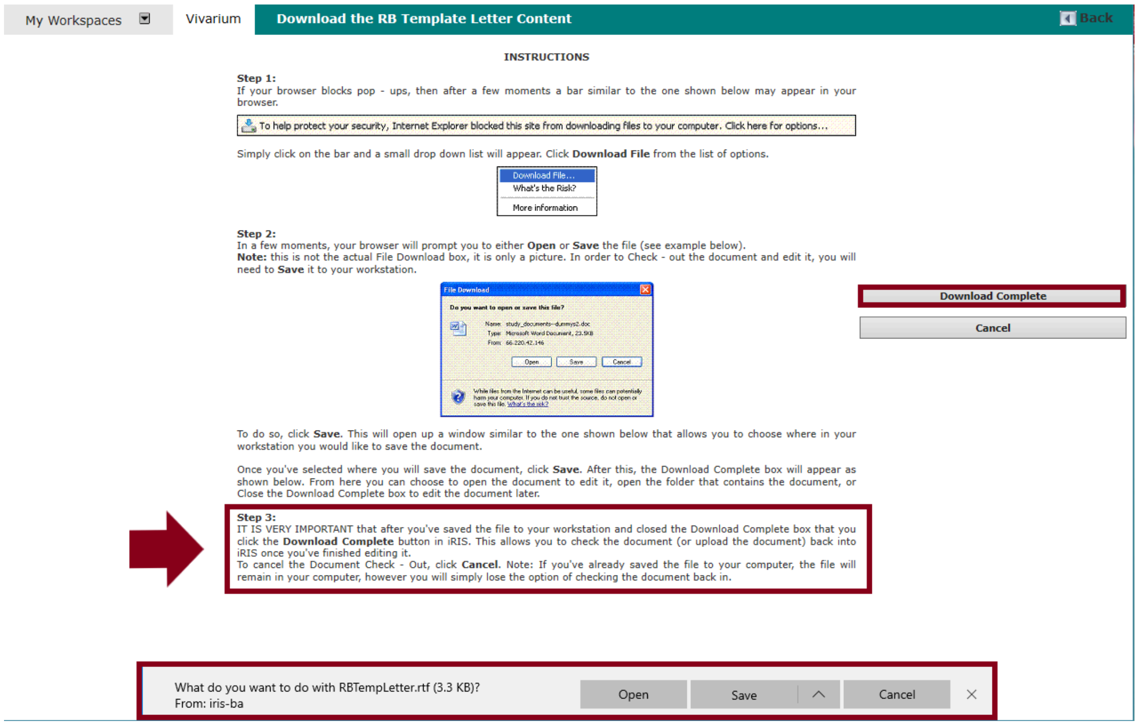
When all desired revisions are complete using the **HTML Content** tab, click the **Save the Letter Template** button to save changes and close the edit panel.



Click the **Check In/Out** tab (blue arrow in screenshot above) to access the second editing method. As shown below, the **Check In/Out** tab is opened.



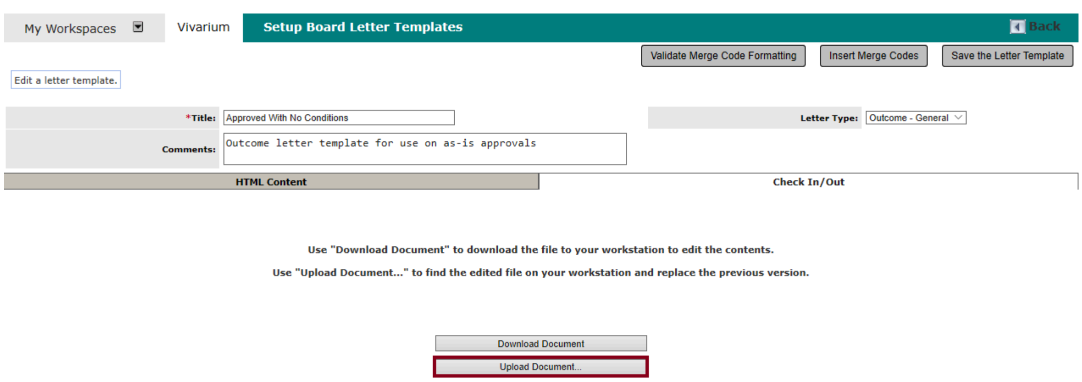
As per the instructions provided on this tab, click the **Download Document** button to download a copy of the letter template in RTF format. The **Download the RB Template Letter Content** page opens, as shown below.



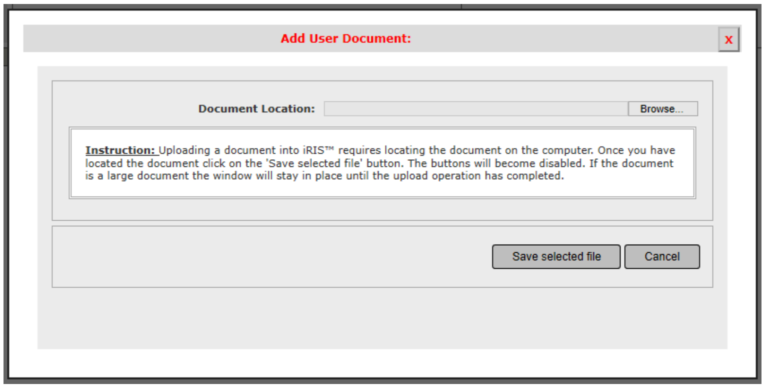
IMPORTANT: READ AND FOLLOW THE DIRECTIONS PROVIDED ON THE PAGE TO ENSURE UPLOAD OF THE REVISED DOCUMENT WILL BE ENABLED. See items boxed in red in the screenshot above.

Make desired changes to the downloaded copy of the letter template in any rich text editor and save the file under the same name as the original download.

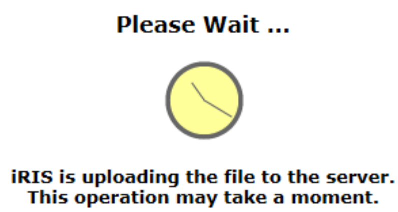
Return to the **Setup Board Letter Templates** page and click the icon in the **Edit** column for the applicable template. Click the **Check In/Out** tab (shown below) and click the **Upload Document** button.



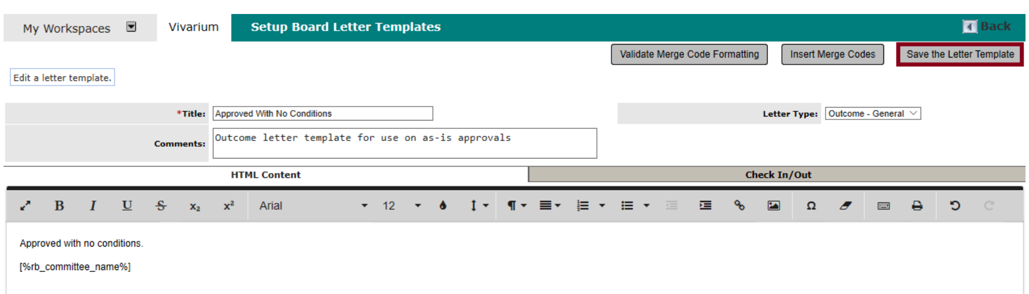
An **Add User Document** popup opens, as shown below.



Follow the directions in the popup to navigate to the revised file on the local computer and upload it to the iRIS™ system. As shown below, a countdown popup briefly appears as the upload is processed.

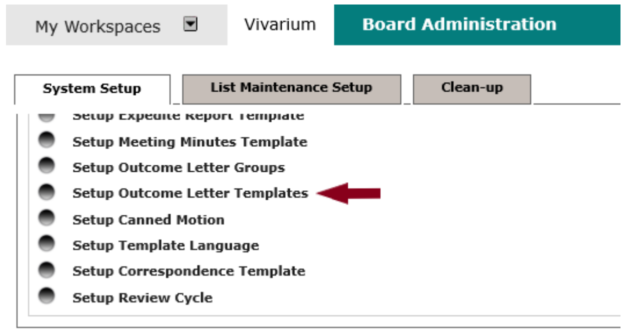


When the popup closes, back in the Edit a letter template panel, click the **Save the Letter Template** button to save changes and close the edit panel.

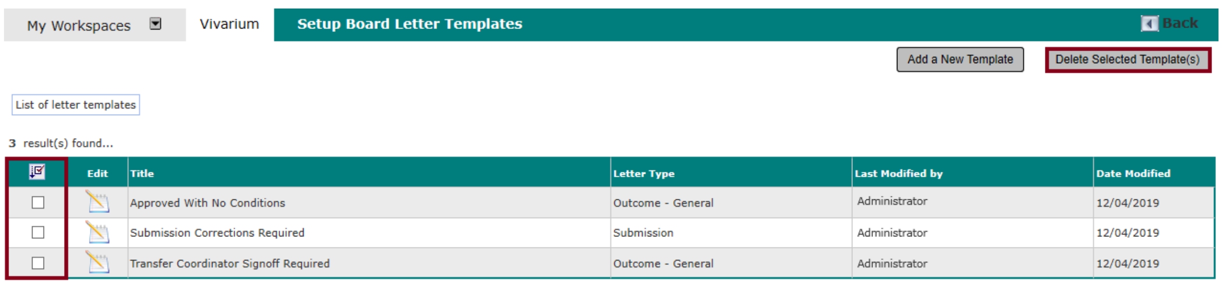


Delete Outcome Letter Template

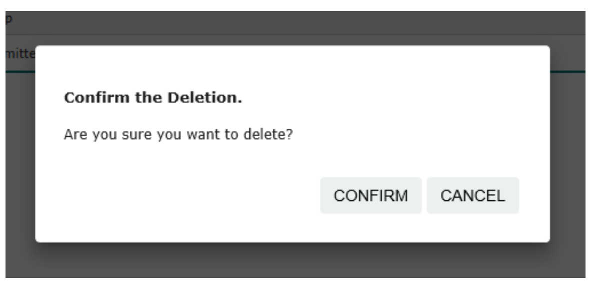
Navigate to Animal Resource Center > Review Board Administration > System Setup tab > **Setup Outcome Letter Templates** link.



The **Setup Board Letter Templates** page opens, as shown below. Select the checkbox(es) in the far-left column for the template(s) to be deleted, then click the **Delete Selected Template(s)** button.



A confirmation popup displays.



Click the **CANCEL** button to return to the **Setup Board Letter Templates** page without deleting the selected template(s).

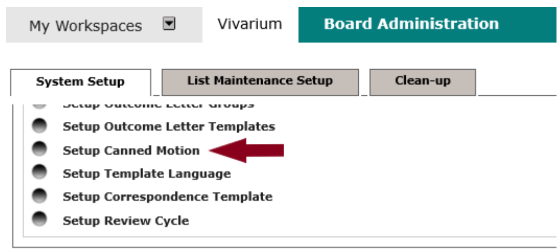
Click the **CONFIRM** button to confirm the deletion and return to the **Setup Board Letter Templates** page.

Setup Canned Motion

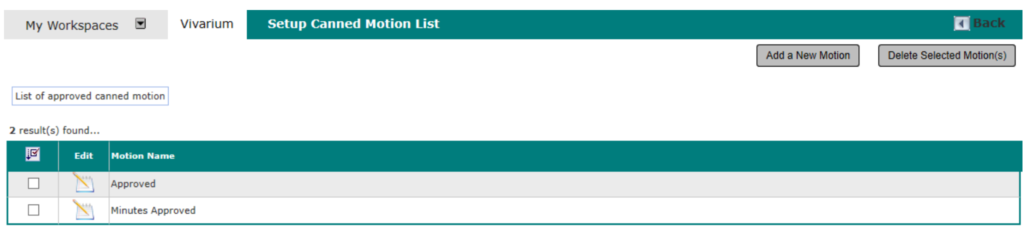
The iRIS™ system provides the ability for institutions to configure a list of predefined ("canned") motions for use in review board meetings. There is no limit to the number of canned motions that can be configured in this list.

Any configured canned motion is added to the **Precanned Motion text** dropdown list on the **Submission Motion** page of the Vote tab in Submission processing screens.

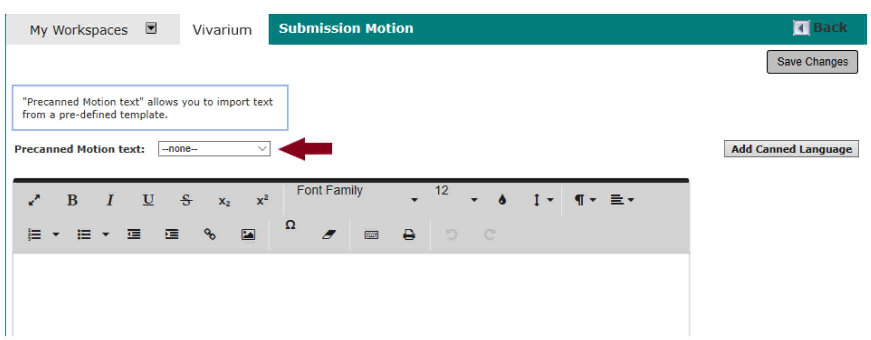
To access the configuration list, click the **Setup Canned Motion** link under Animal Resource Center > Review Board Administration > System Setup tab.



The **Setup Canned Motion List** page opens.

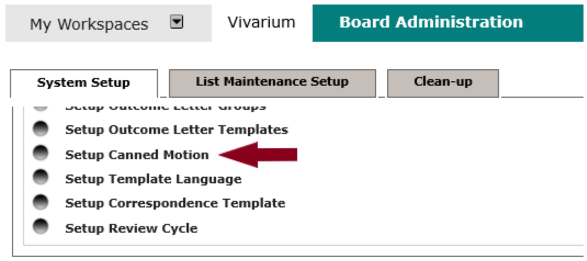


Any canned motion configured here is added to the **Precanned Motion text** dropdown list on the Vote tab of Submission processing screens.

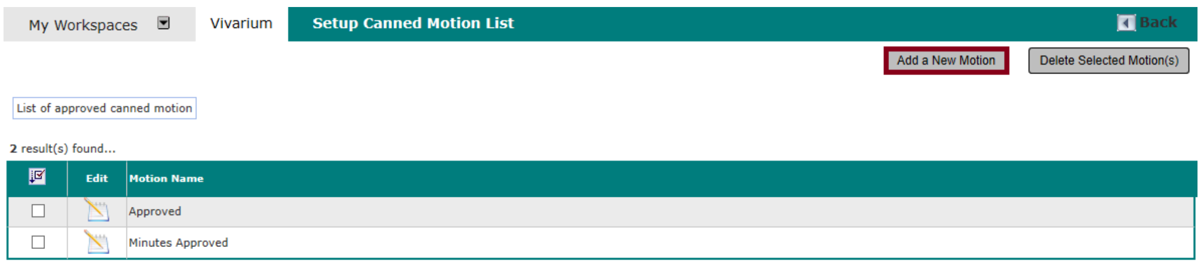


Add Canned Motion

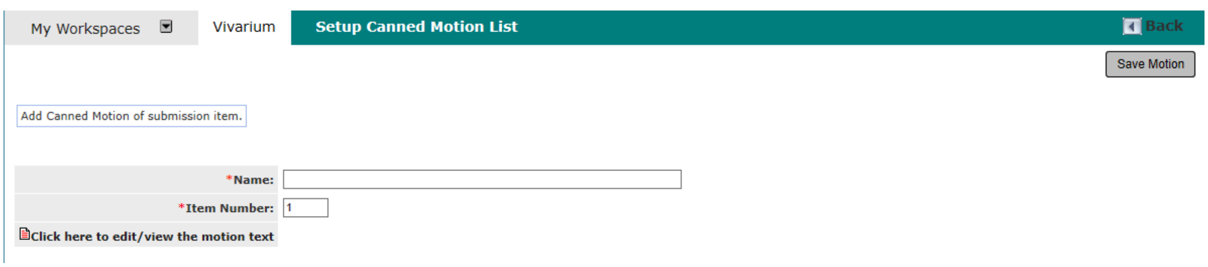
Navigate to Animal Resource Center > Review Board Administration > System Setup tab > **Setup Canned Motion** link.



The **Setup Canned Motion List** page opens.

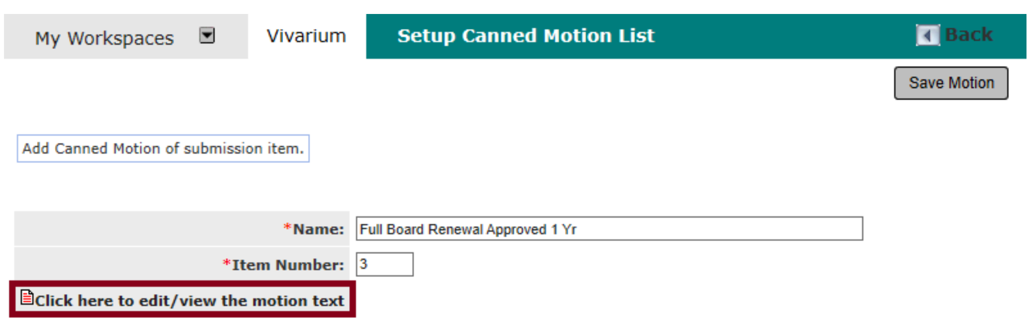


As shown below, an **Add Canned Motion of submission item** panel opens for configuration of the motion.

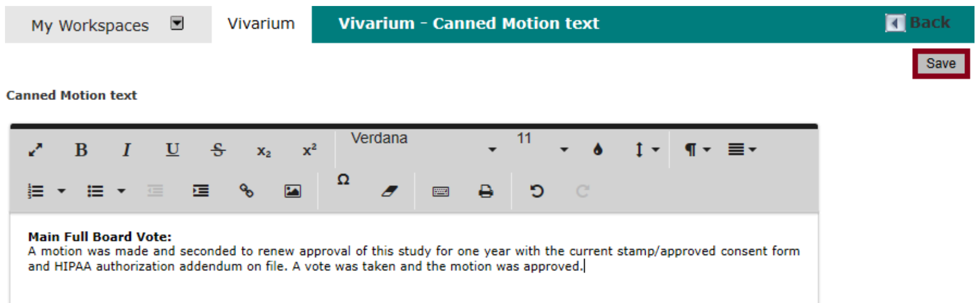


Enter the desired **Name** and **Item Number**. **Item Number** dictates the order in which canned motions appear on the **Setup Canned Motion List** page and in the Precanned Motion text dropdown list on the Vote tab of Submission processing screens.

Click the **Click here to edit/view the motion text** link to enter desired motion text.

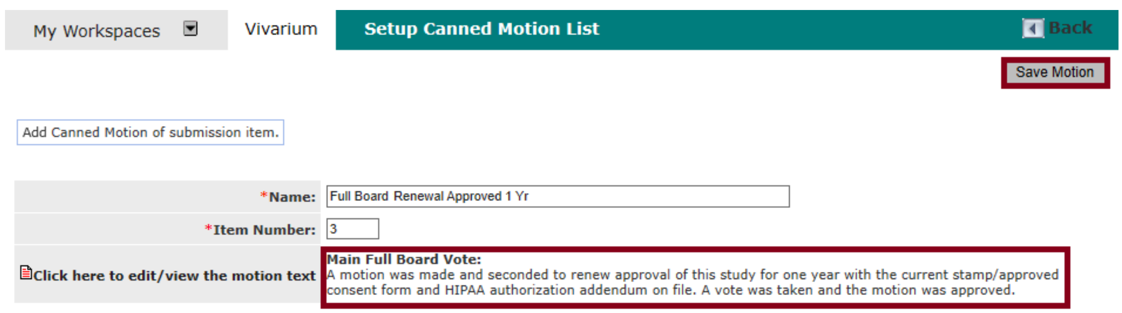


As shown below, a **Canned Motion text** page with a text editor for creation and formatting of the motion text opens.

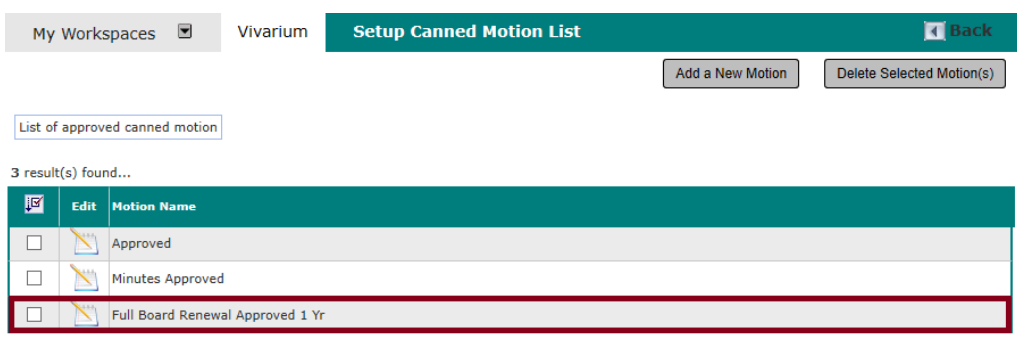


Enter desired motion text and apply any desired formatting, as shown above, then click the **Save** button.

As shown below, the text is added to the Add Canned Motion of submission item panel. Click the **Save Motion** button.

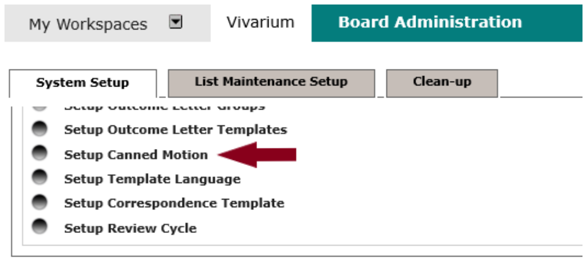


As shown below, the motion is added on the **Setup Canned Motion List** page.

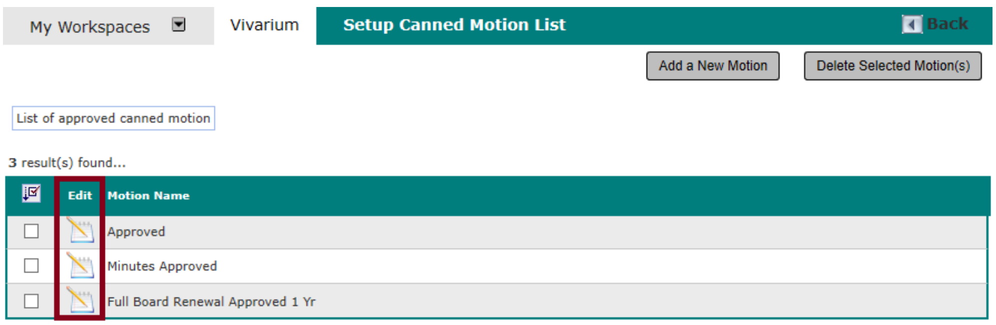


Edit Canned Motion

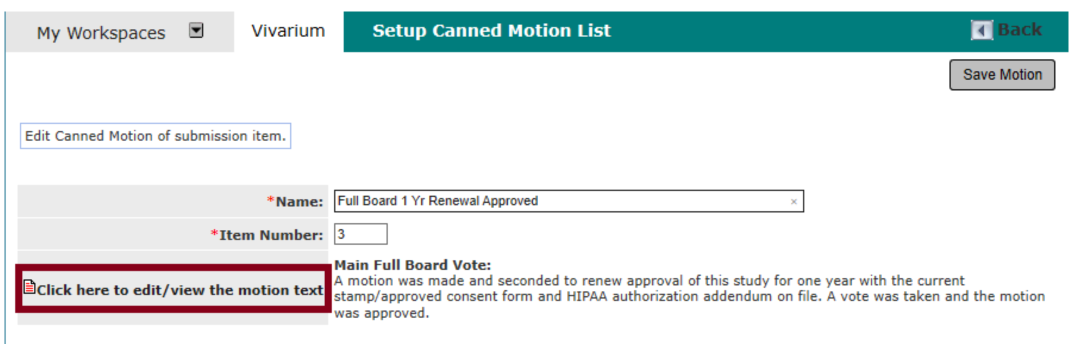
Navigate to Animal Resource Center > Review Board Administration > System Setup tab > **Setup Canned Motion** link.



The **Setup Canned Motion List** page opens. Click the icon in the **Edit** column for the applicable motion.

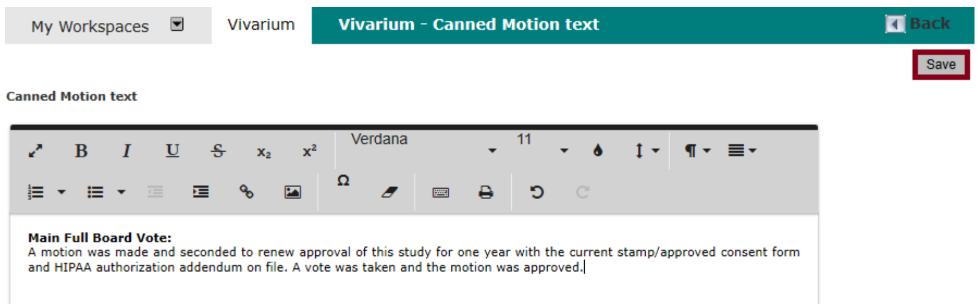


As shown below, an **Edit Canned Motion of submission item** panel opens for configuration of the motion.

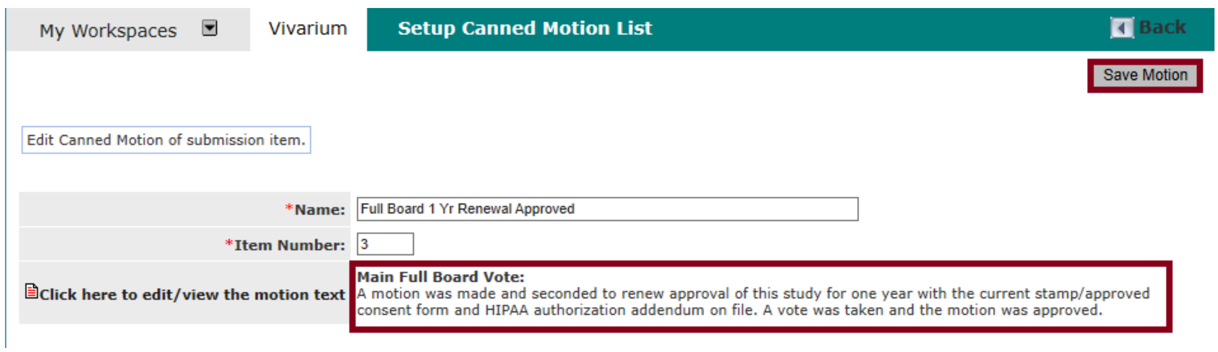


Revise the **Name** and **Item Number** fields as desired. **Item Number** dictates the order in which canned motions appear on the **Setup Canned Motion List** page and in the Precanned Motion text dropdown list on the Vote tab of Submission processing screens.

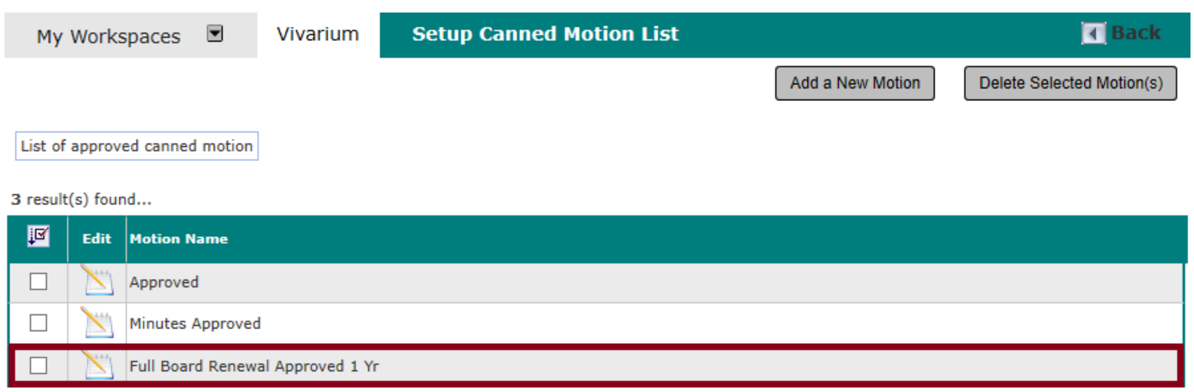
Click the **Click here to edit/view the motion text** link to revise the motion text. As shown below, the motion is opened in a **Canned Motion text** page with a text editor for revision and formatting of the motion text.



When changes are complete click the **Save** button. As shown below, the text is added to the Edit Canned Motion of submission item panel. Click the **Save Motion** button.

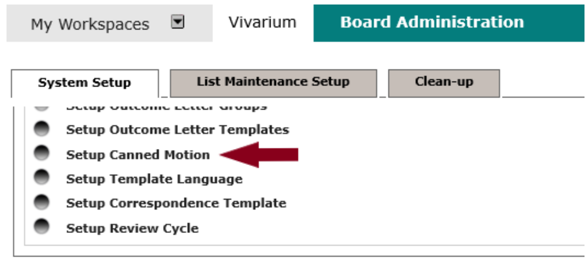


As shown below, the motion is revised on the **Setup Canned Motion List** page.

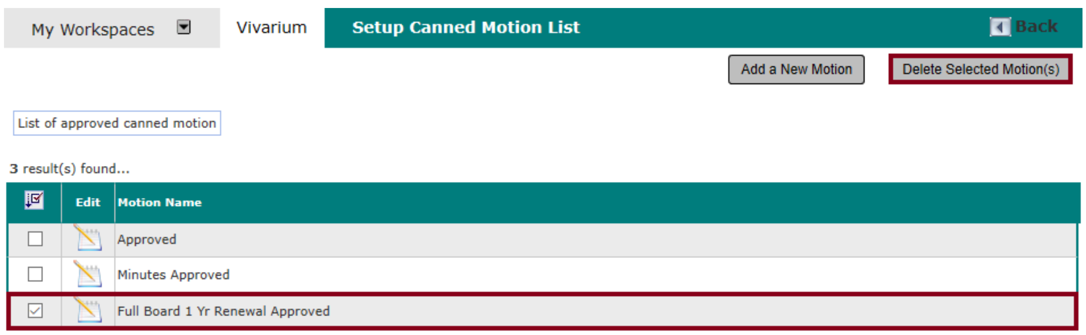


Delete Canned Motion

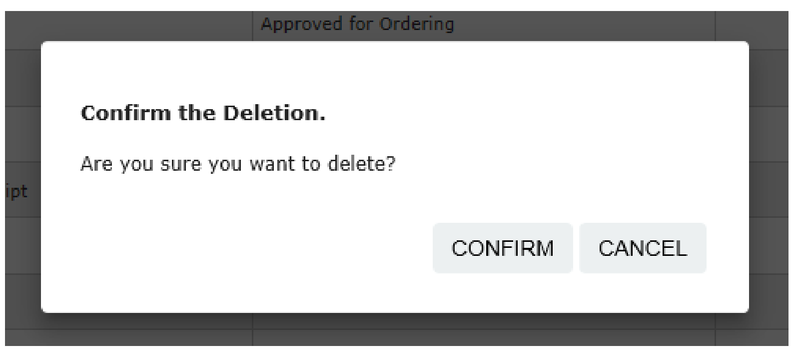
Navigate to Animal Resource Center > Review Board Administration > System Setup tab > **Setup Canned Motion** link.



The **Setup Canned Motion List** page opens. Select the checkbox(es) in the far-left column for the motion(s) to be deleted, then click the **Delete Selected Motion(s)** button.

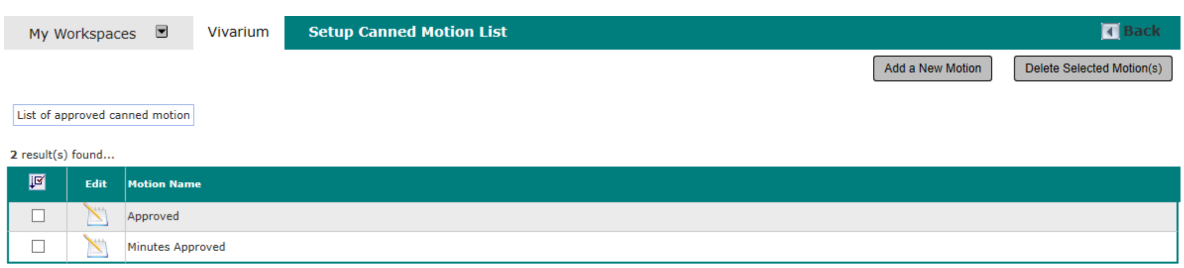


A confirmation popup window displays.



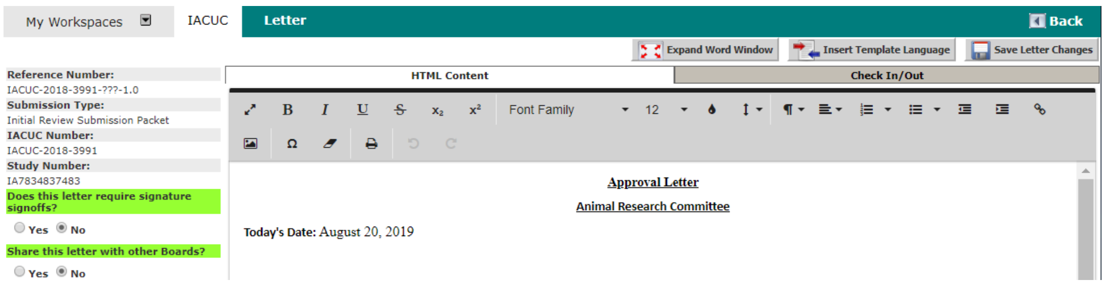
Click **CANCEL** to return to the **Setup Canned Motion List** page without deleting the motion(s).

Click **CONFIRM** to delete the motion(s) and return to the **Setup Canned Motion List** page. The motion(s) is(are) deleted.

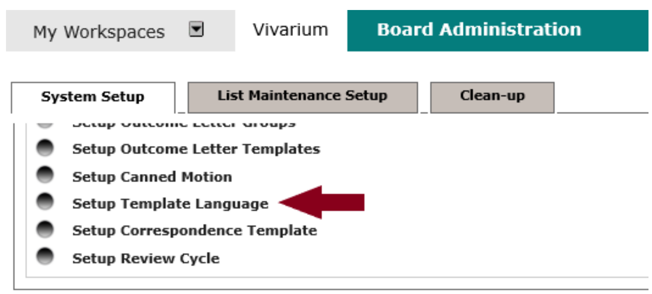


Setup Template Language

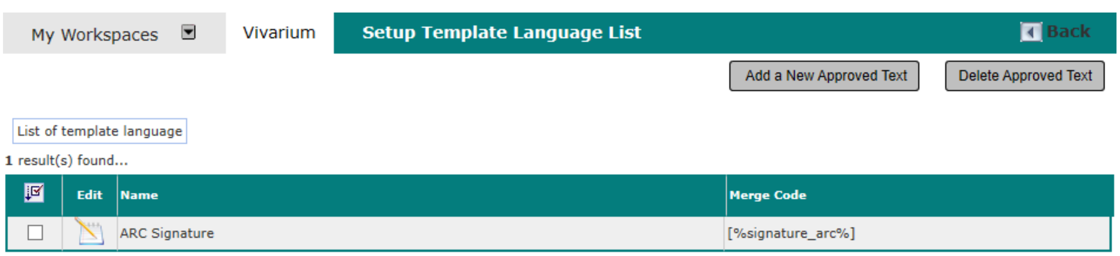
The iRIS™ system provides the ability for institutions to configure a list of predefined ("canned") text blocks for insertion in Minutes, Agendas, and Outcome Letter documents via an **Insert Template Language** button, as shown below.



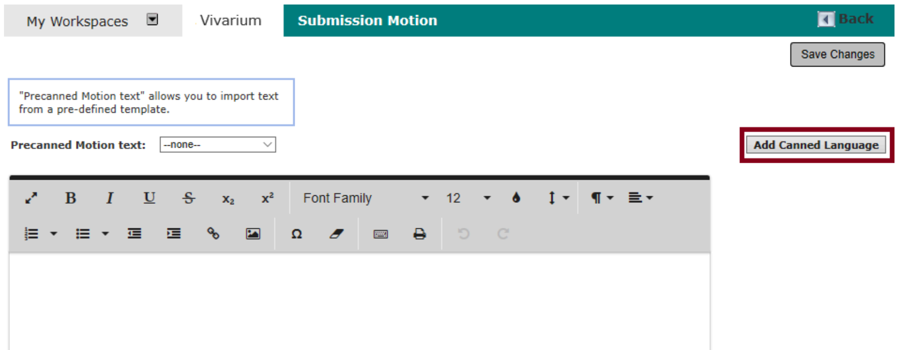
To access the configuration list, click the **Setup Template Language** link under Animal Resource Center > Review Board Administration > System Setup tab.



The **Setup Template Language List** page opens.



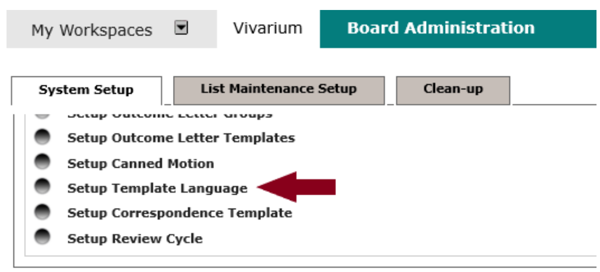
Any block of template language configured here is saved as a Merge Code and made available for insertion in Minutes, Agendas, and Outcome Letters via an **Add Canned Language** button on the applicable processing pages.



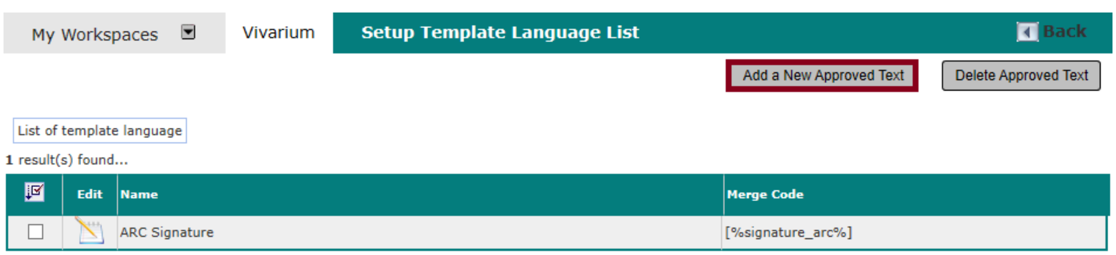
See the Using Merge Codes in Document Templates section of this manual for more information about working with Merge Codes.

Add Template Language

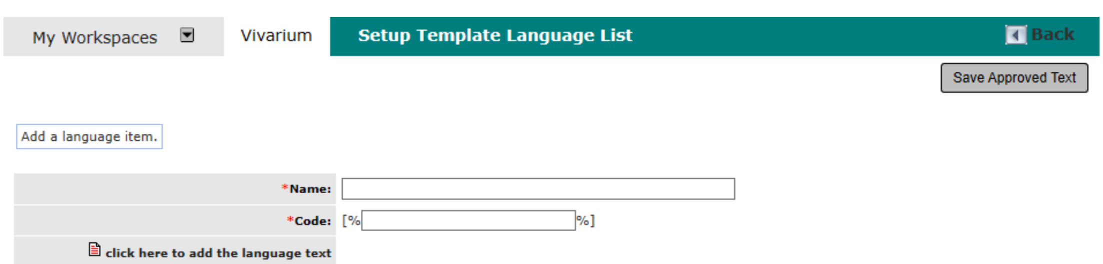
Navigate to Animal Resource Center > Review Board Administration > System Setup tab > **Setup Template Language** link.



The **Setup Template Language List** page opens. Click the **Add a New Approved Text** button.

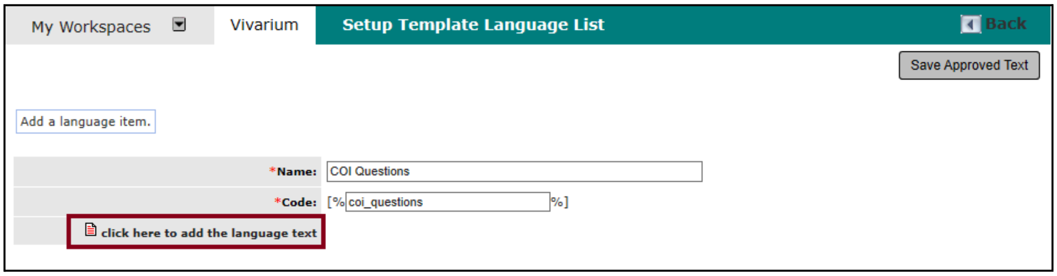


As shown below, an **Add a language item** panel opens for configuration of the text block.

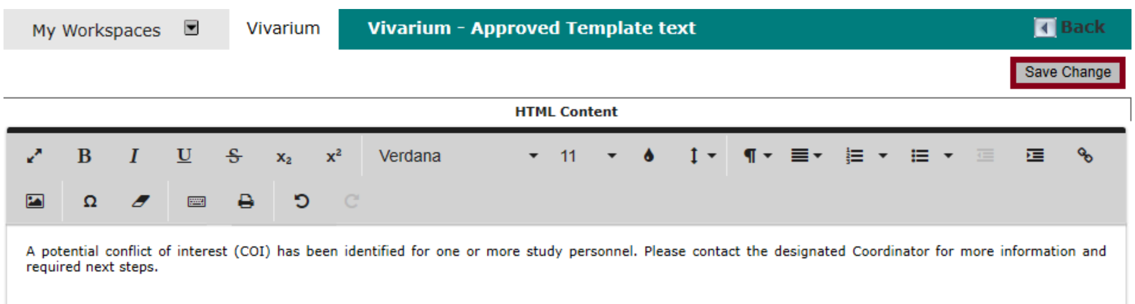


Enter a descriptive **Name** and the desired Merge **Code** to be assigned to the block of text. *Note that the code must include underscores where spaces occur between words, and cannot include any special characters (e.g., &, #, etc.).*

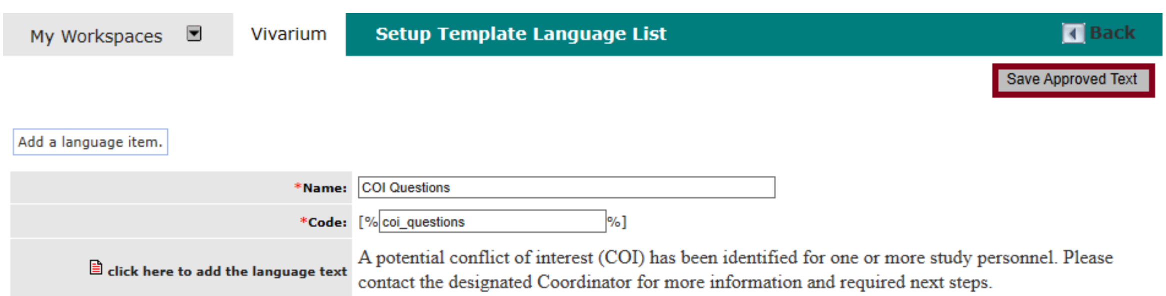
In the example below, a Name and Code are entered. Click the **click here to add the language text** link.



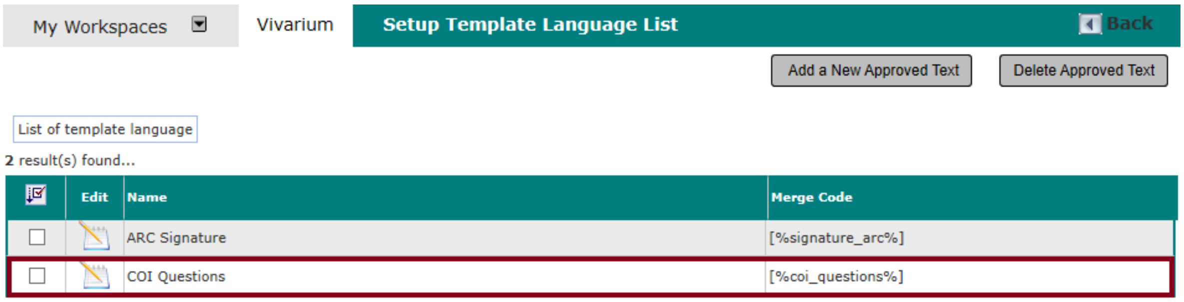
The **Approved Template text** page opens with a text editor for entry and formatting of the text block. Notice that no Insert Merge Code button is available on this page. This is because the text block entered here will itself be saved as a Merge Code, and Merge Codes cannot be nested within text blocks.



In the example shown above the desired text is entered. Click the **Save Change** button. The text block is added to the **Add a language item** panel.

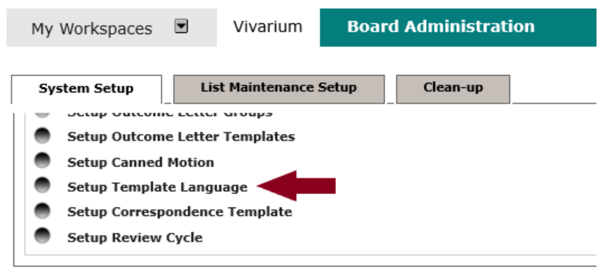


Click the **Save Approved Text** button. As shown below, the item is added on the **Setup Template Language List** page.

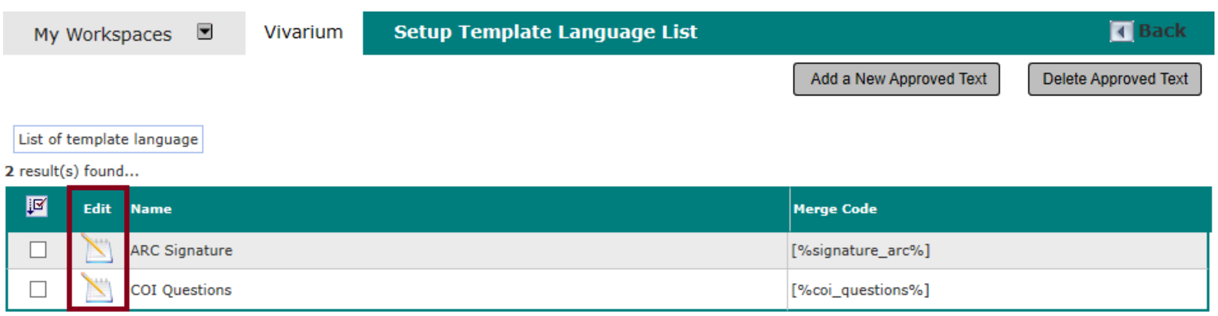


Edit Template Language

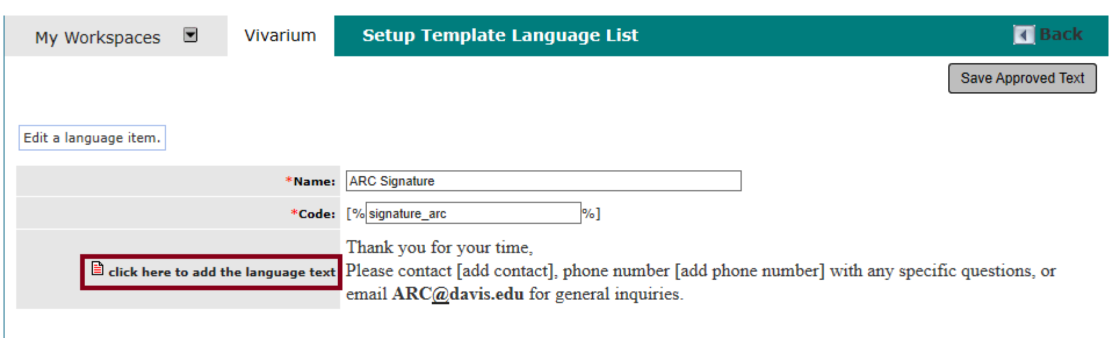
Navigate to Animal Resource Center > Review Board Administration > System Setup tab > **Setup Template Language** link.



The **Setup Template Language List** page opens. Click the icon in the **Edit** column for the applicable item.

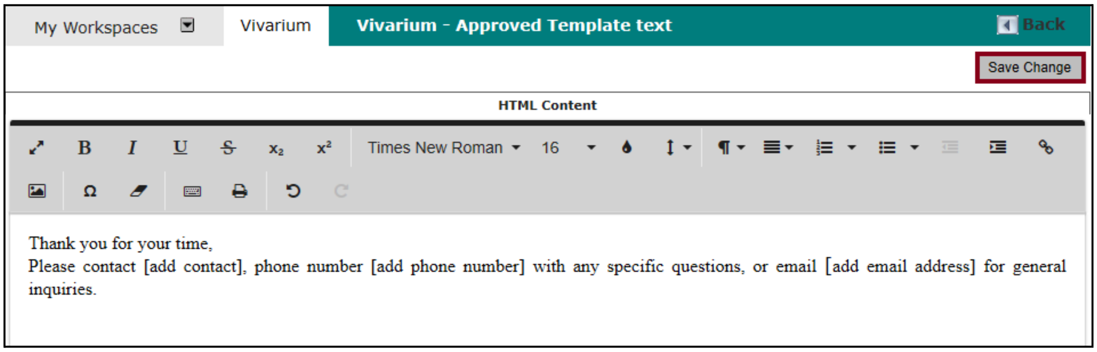


As shown below, an **Edit a language item** panel opens for revision of the text block.



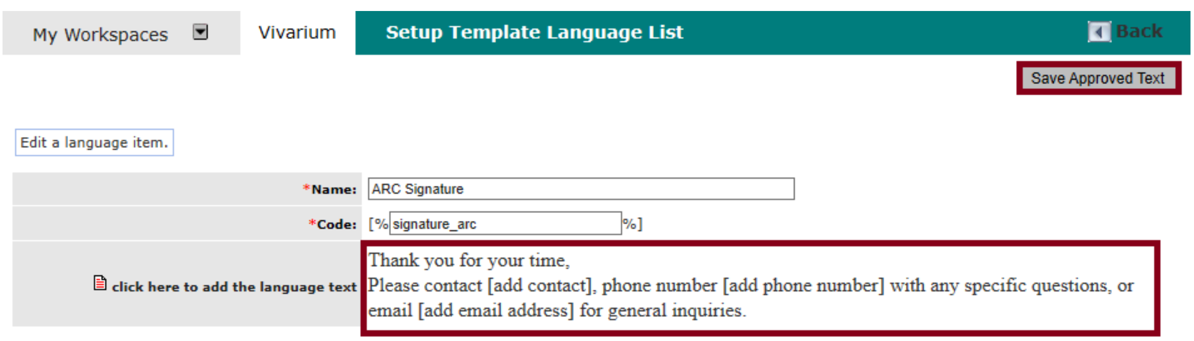
Make desired changes to the **Name** and Merge **Code** fields. *Note that the code must include underscores where spaces occur between words, and cannot include any special characters (e.g., &, #, etc.).*

Click the **click here to add the language text** link to edit the text block. As shown below, the text block is opened for editing in the **Approved Template text** page.

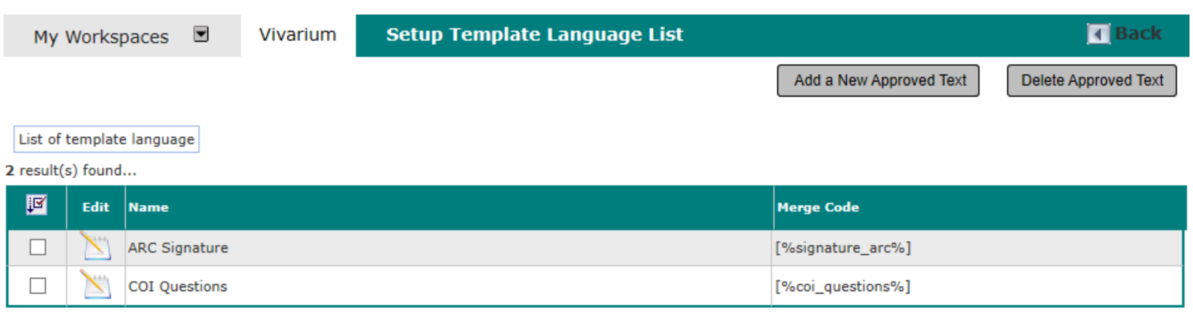


Notice that no Insert Merge Code button is available on this page. This is because the text block entered here will itself be saved as a Merge Code, and Merge Codes cannot be nested within text blocks.

Make desired changes to the text block, then click the **Save Change** button. As shown below, the text is added to the **Edit a language item** panel. Click the **Save Approved Text** button.

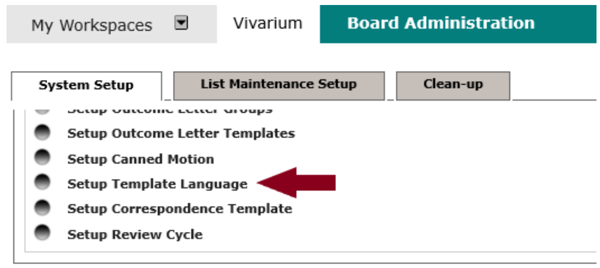


The edit panel closes, and the item is revised.

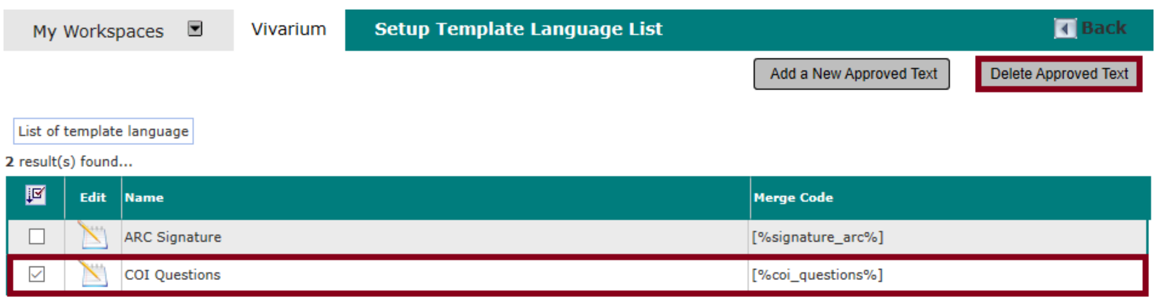


Delete Template Language

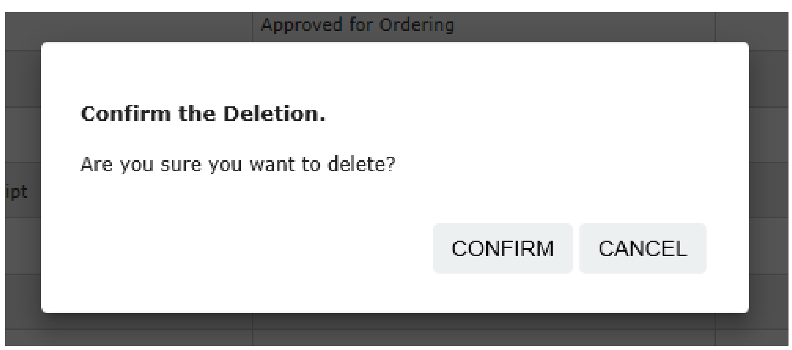
Navigate to Animal Resource Center > Review Board Administration > System Setup tab > **Setup Template Language** link.



The **Setup Template Language List** page opens. Select the checkbox(es) in the far-left column for the item(s) to be deleted, then click the **Delete Approved Text** button.

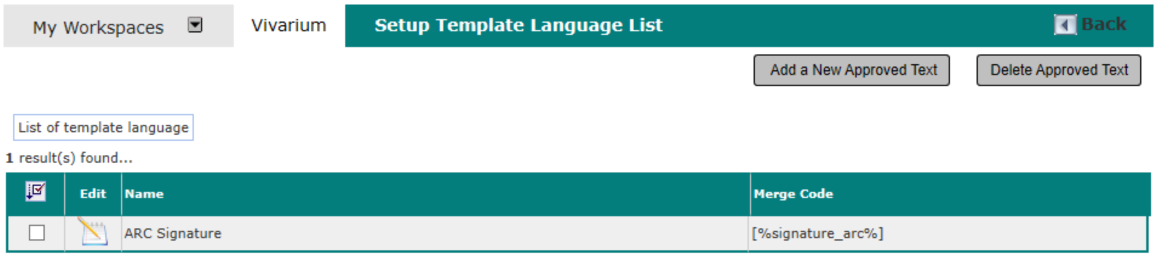


A confirmation popup window displays.



Click **CANCEL** to return to the **Setup Template Language List** page without deleting the item(s).

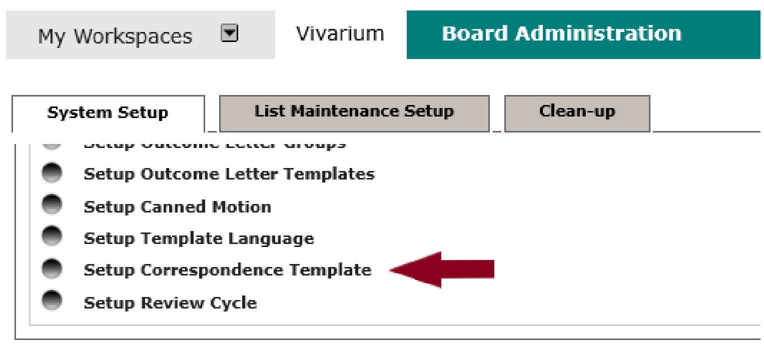
Click **CONFIRM** to delete the item(s) and return to the **Setup Template Language List** page. The item(s) is(are) deleted.



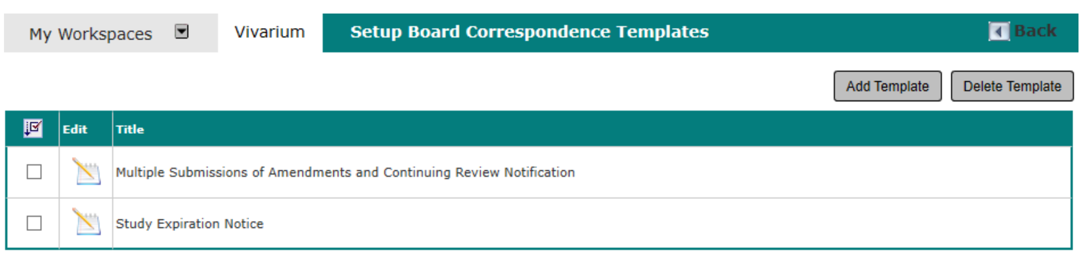
Setup Correspondence Templates

The iRIS™ system provides the ability to configure standardized correspondence templates that include commonly used boilerplate text and can automatically pull a variety of system data into the correspondence when it is generated.

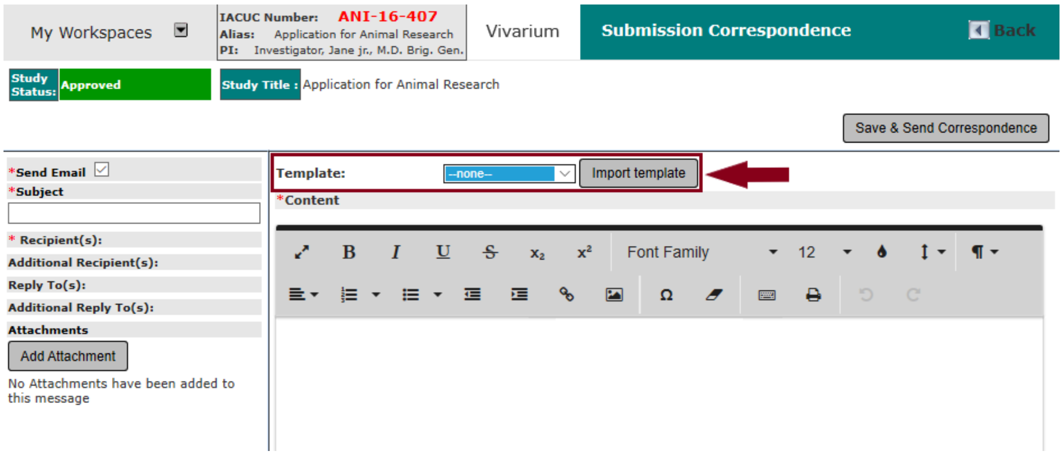
This functionality is provided on the **Setup Board Correspondence Templates** page. To access the page, click the **Setup Correspondence Template** link under Animal Resource Center > Review Board Administration > System Setup tab.



The **Setup Board Correspondence Templates** page opens, as shown below.



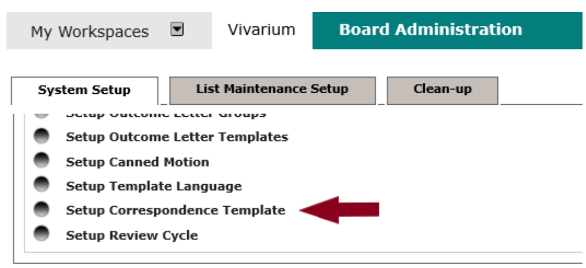
Correspondence templates can be employed when creating a correspondence record within the submission processing screens. Configured templates are made available via a **Template** dropdown picklist above the embedded rich text editor.



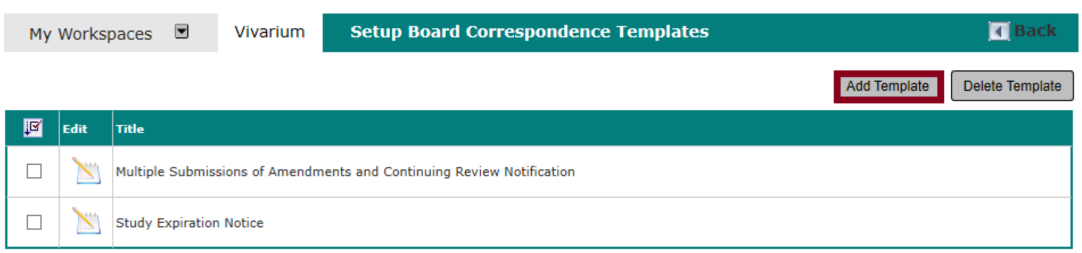
The desired template is selected in the list and when the **Import template** button is clicked, the template's content is pulled into the text editor.

Add Correspondence Template

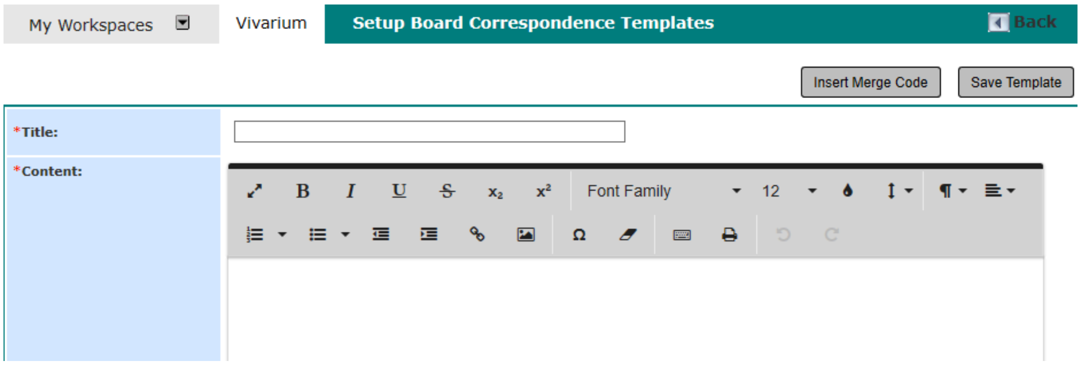
Navigate to Animal Resource Center > Review Board Administration > System Setup Tab > **Setup Correspondence Template** link.



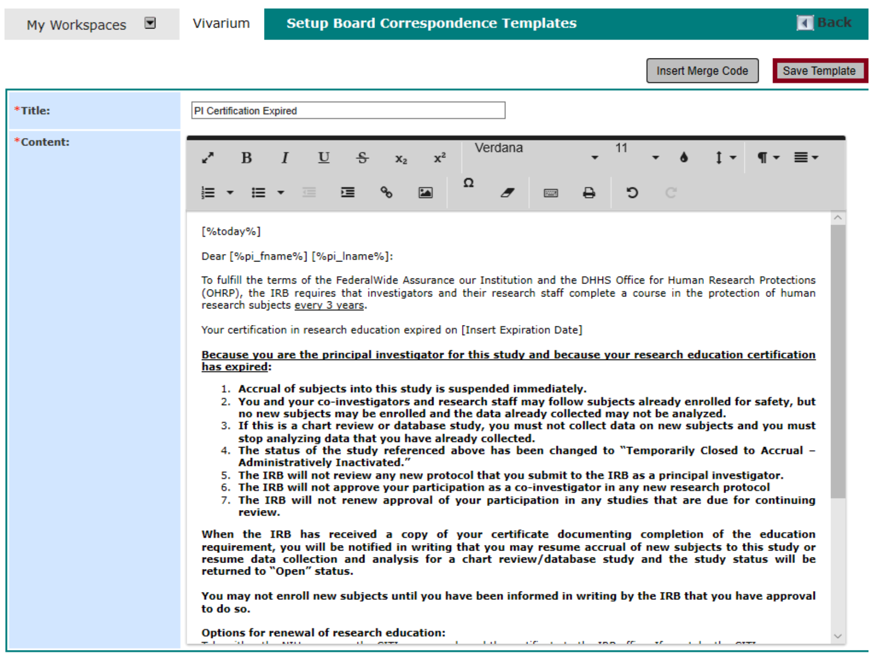
The **Setup Board Correspondence Templates** page opens, as shown below.



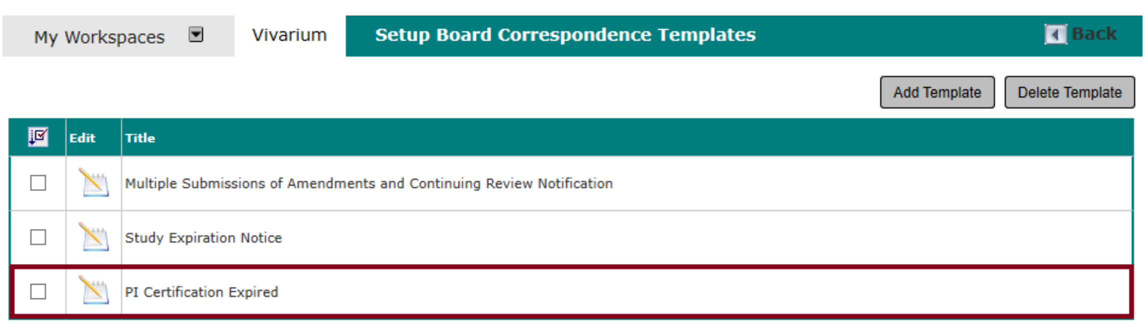
Click the **Add Template** button. As shown below, an add panel opens for creation of the correspondence.



Enter desired text and Merge Codes in the main text editor window. See the Using Merge Codes in Document Templates section of this manual for more information about working with Merge Codes.

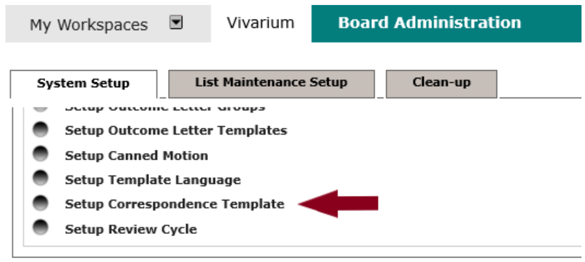


Apply any desired formatting, then click the **Save Template** button. The template is added on the **Setup Board Correspondence Templates** page.

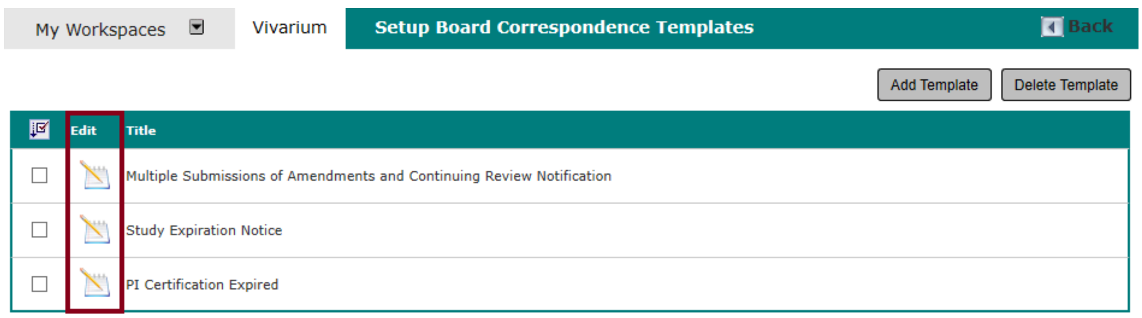


Edit Correspondence Template

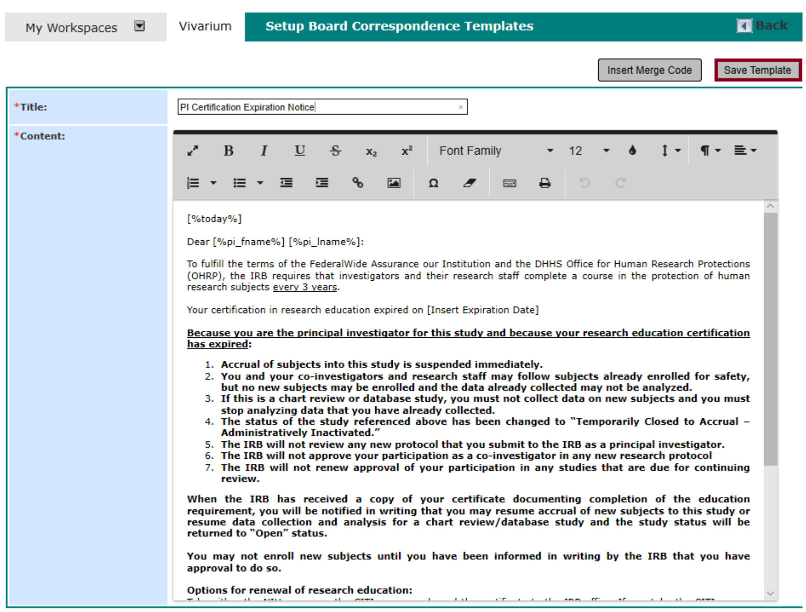
Navigate to Animal Resource Center > Review Board Administration > System Setup Tab > **Setup Correspondence Template** link.



The **Setup Board Correspondence Templates** page opens, as shown below.

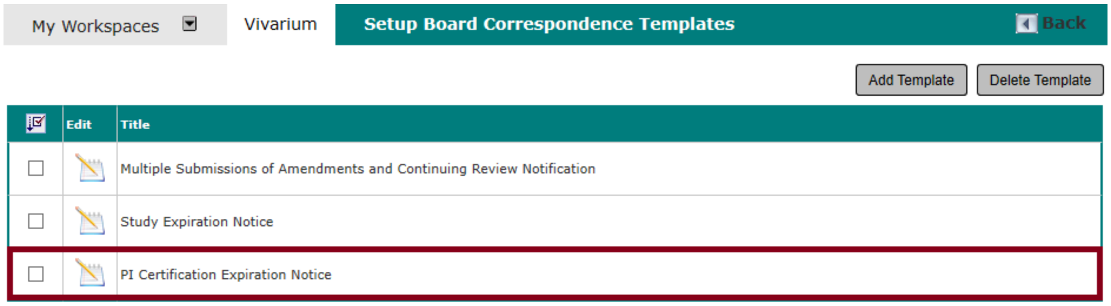


Click the icon in the **Edit** column for the applicable item. As shown below, the correspondence is opened in an edit panel. Make desired changes in the **Title** and **Content** fields.



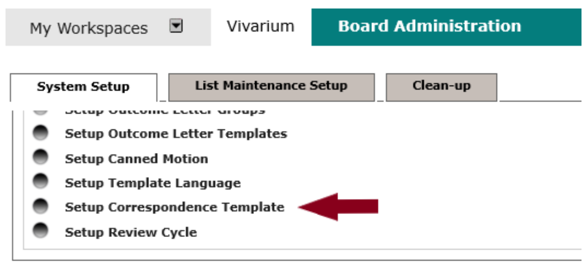
See the Using Merge Codes in Document Templates section of this manual for more information about working with Merge Codes.

When all desired changes are complete, click the **Save Template** button. The template is revised on the **Setup Board Correspondence Templates** page.

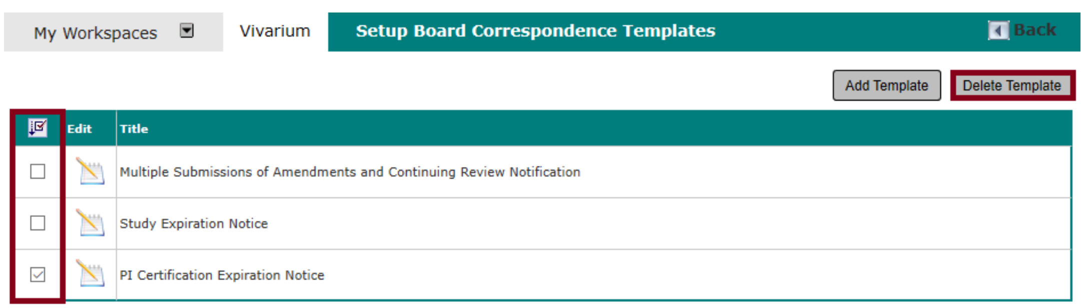


Delete Correspondence Template

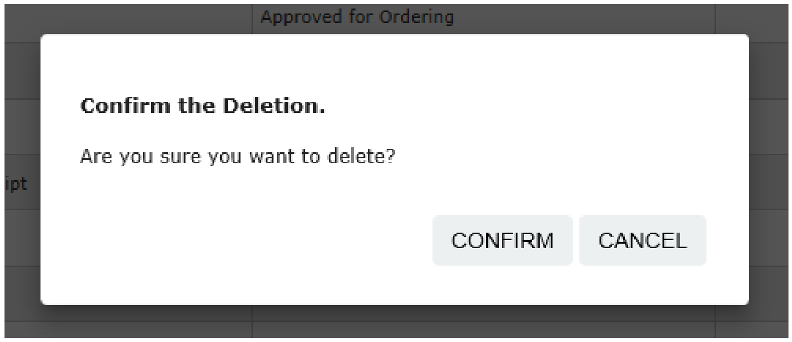
Navigate to Animal Resource Center > Review Board Administration > System Setup Tab > **Setup Correspondence Template** link.



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

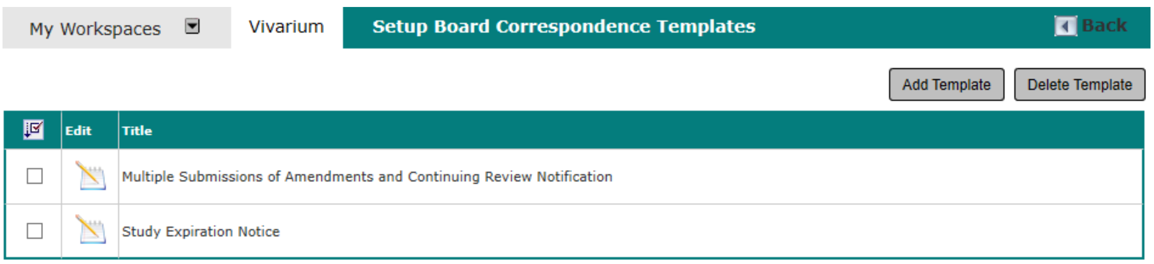


A confirmation popup window displays.



Click **CANCEL** to return to the **Setup Board Correspondence Templates** page without deleting the template(s).

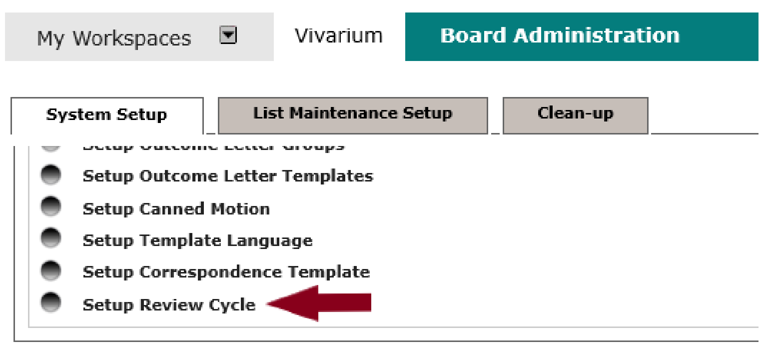
Click **CONFIRM** to delete the item(s) and return to the **Setup Board Correspondence Templates** page. The template(s) is(are) deleted.



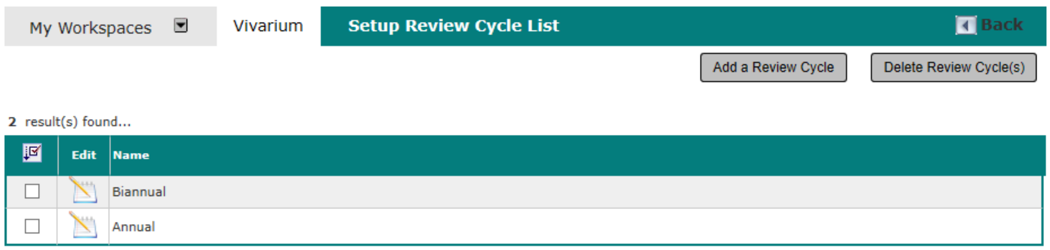
Setup Review Cycle

The iRIS™ system provides the ability to configure standardized review cycle terms

This functionality is provided on the **Setup Review Cycle List** page. To access the page, click the **Setup Review Cycle** link under Animal Resource Center > Review Board Administration > System Setup tab.

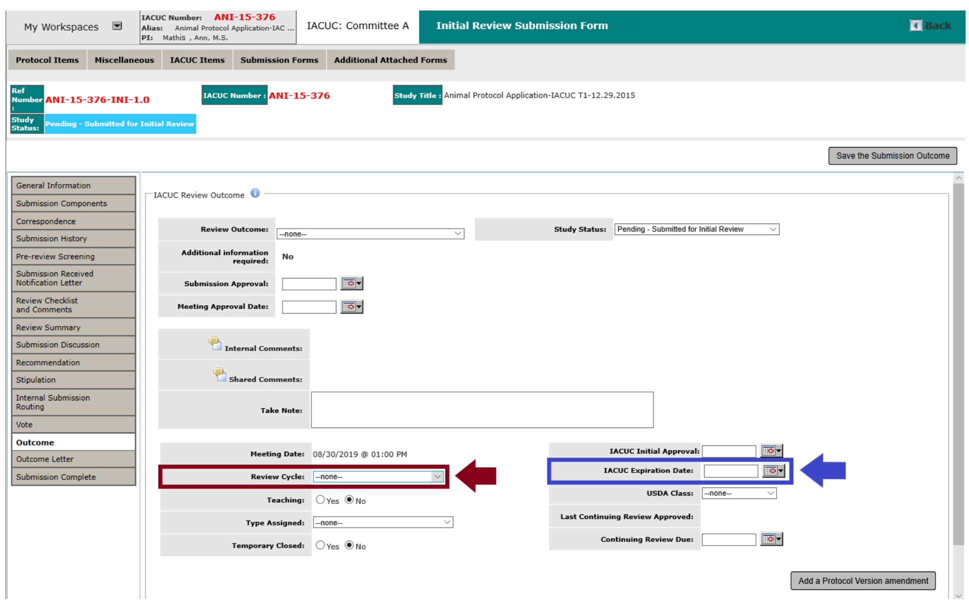


The **Setup Review Cycle List** page opens, as shown below.

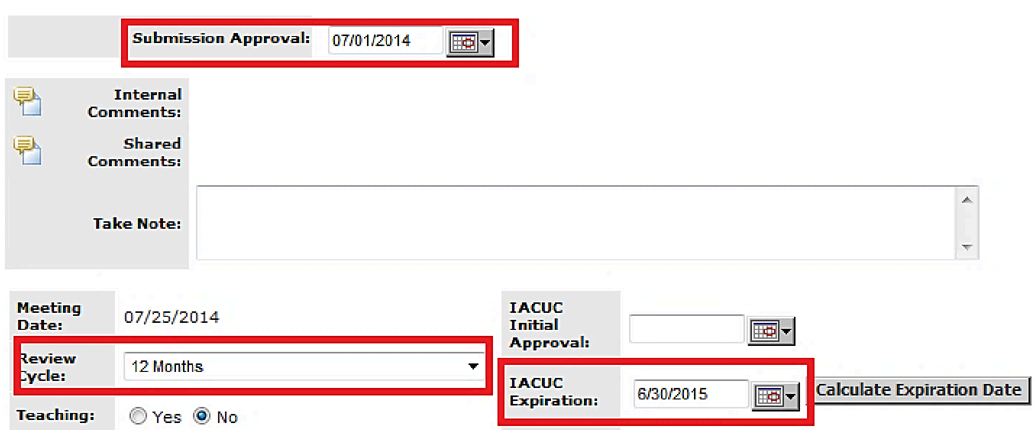


Review cycles configured here populate the **Review Cycle** dropdown picklist on the **Outcome** tab of submission processing screens (red box and arrow in screenshot below).

When an item is selected from the **Review Cycle** picklist on an approved submission, the **IACUC Expiration Date** field automatically calculates the corresponding expiration date (blue box and arrow in screenshot below) based on the Submission Approval date.



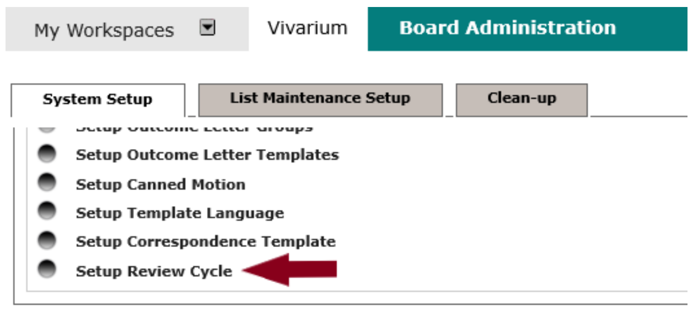
The **IACUC Expiration** date auto-populates based on the **Submission Approval** date and the number of months in the **Review Cycle** selected.



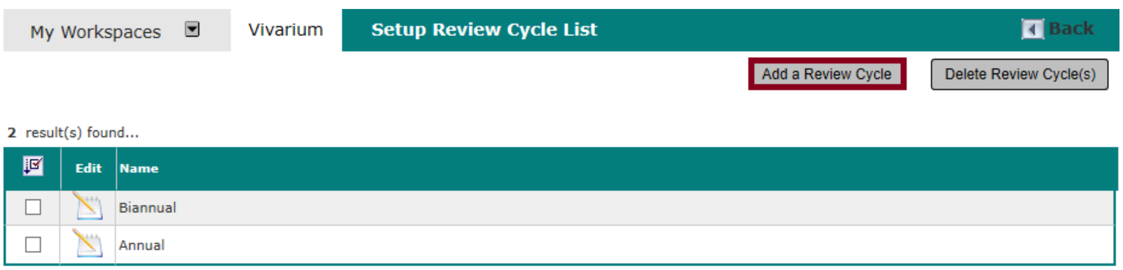
*Note that where the **Review Cycle** field is left blank the user designates an expiration date using the calendar widget provided for the expiration date field.*

Add Review Cycle

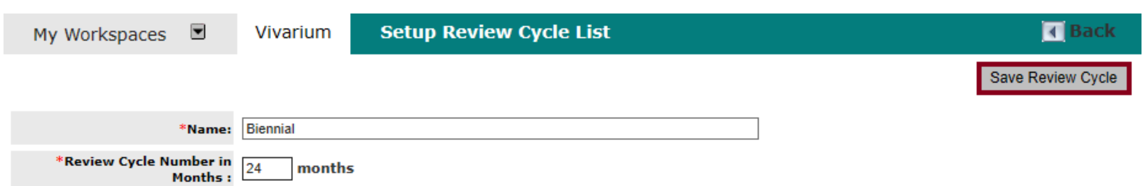
Navigate to Animal Resource Center > Review Board Administration > System Setup tab > **Setup Review Cycle** link.



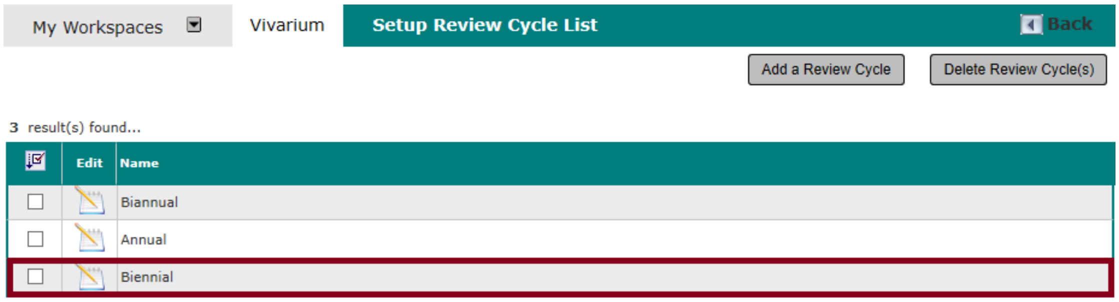
The **Setup Review Cycle List** page opens, as shown below. Click the **Add a Review Cycle** button.



An add panel is opened for creation of the new review cycle. Enter a descriptive **Name**, then enter the number of months for the cycle in the **Review Cycle Number in Months** field. An example of the filled panel is shown below.

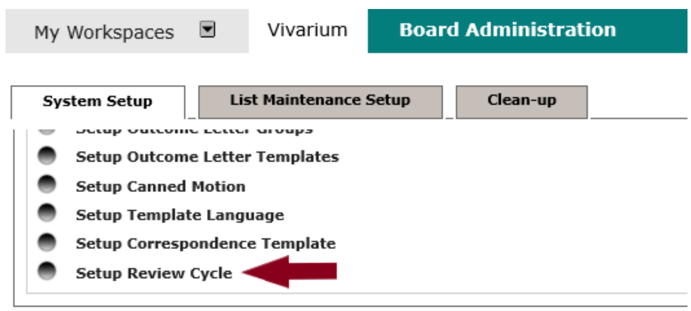


Click the **Save Review Cycle** button to save the new review cycle and close the add panel. As shown below, the new review cycle is added on the **Setup Review Cycle List** page.

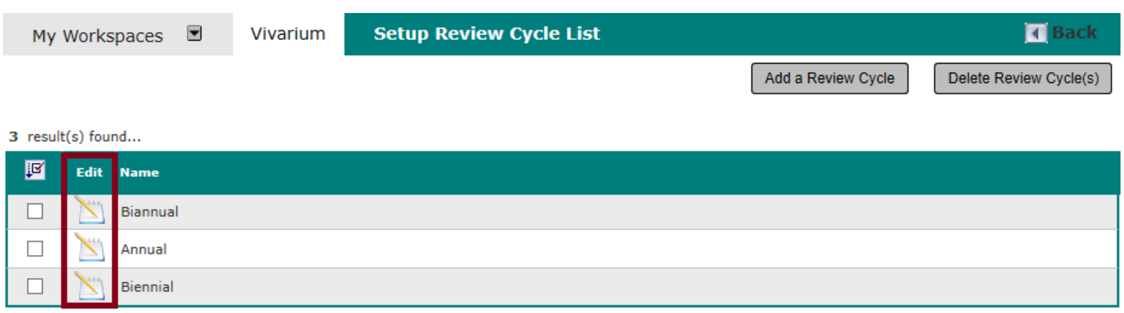


Edit Review Cycle

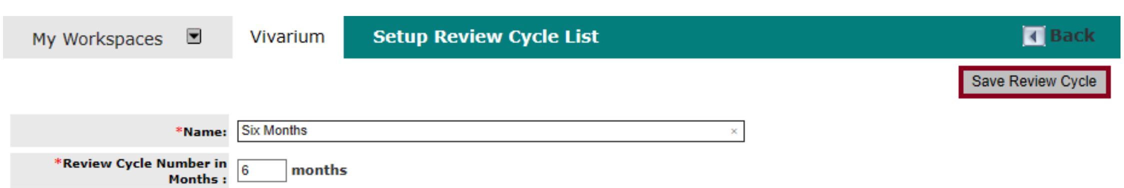
Navigate to Animal Resource Center > Review Board Administration > System Setup tab > **Setup Review Cycle** link.



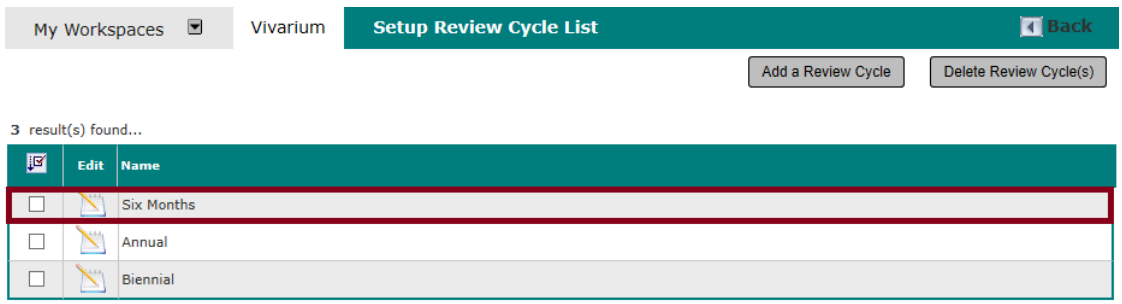
The **Setup Review Cycle List** page opens, as shown below. Click the icon in the **Edit** column for the applicable review cycle.



The selected review cycle is opened in an edit panel. Make desired changes to the **Name** and **Review Cycle Number in Months** fields, then click the **Save Review Cycle** button to save changes and close the edit panel.

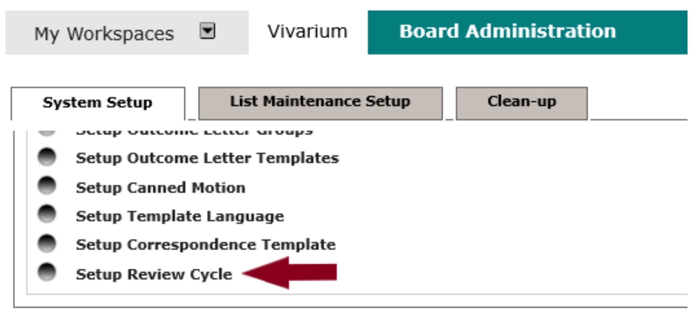


The review cycle is revised on the **Setup Review Cycle List** page.

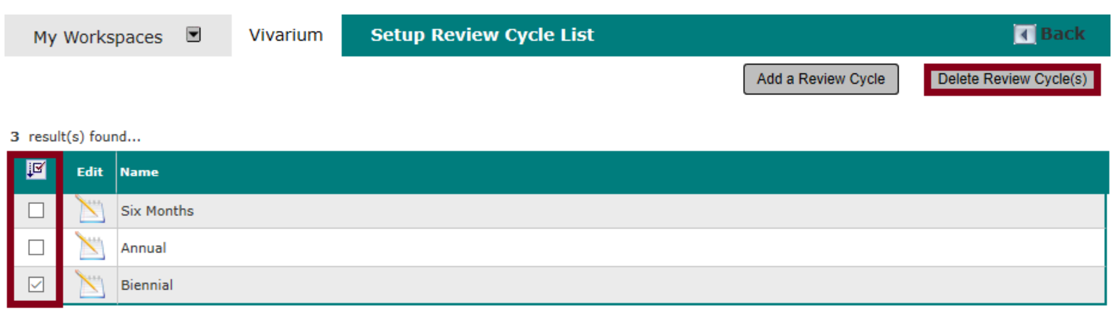


Delete Review Cycle

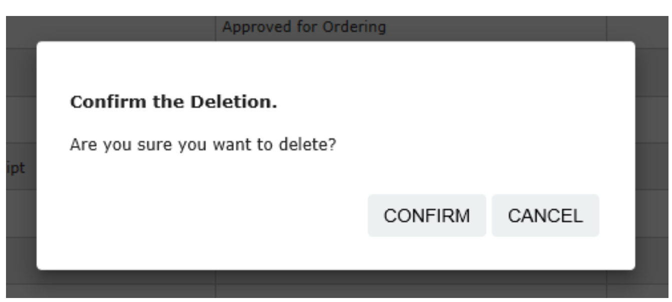
Navigate to Animal Resource Center > Review Board Administration > System Setup tab > **Setup Review Cycle** link.



The **Setup Review Cycle List** page opens, as shown below. Select the checkbox(es) in the far-left column for the review cycle(s) to be deleted, then click the **Delete Review Cycle(s)** button.

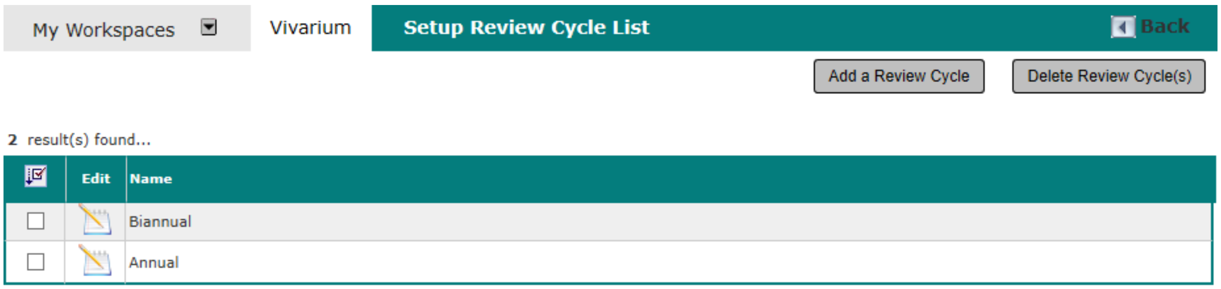


A confirmation popup window displays.



Click **CANCEL** to return to the **Setup Review Cycle List** page without deleting the selected review cycle(s).

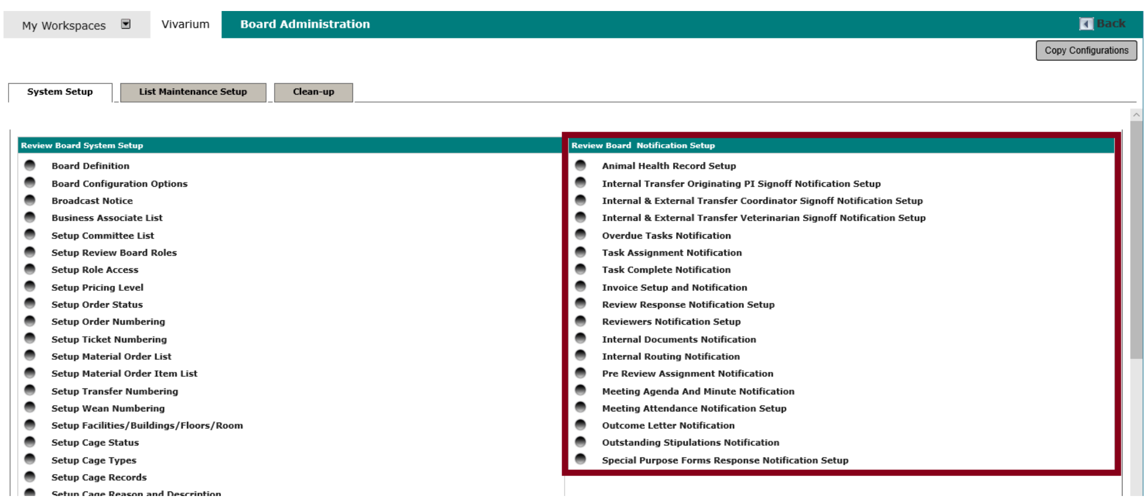
Click **CONFIRM** to delete the item(s) and return to the **Setup Review Cycle List** page. The review cycle(s) is(are) deleted.



Setup Notifications

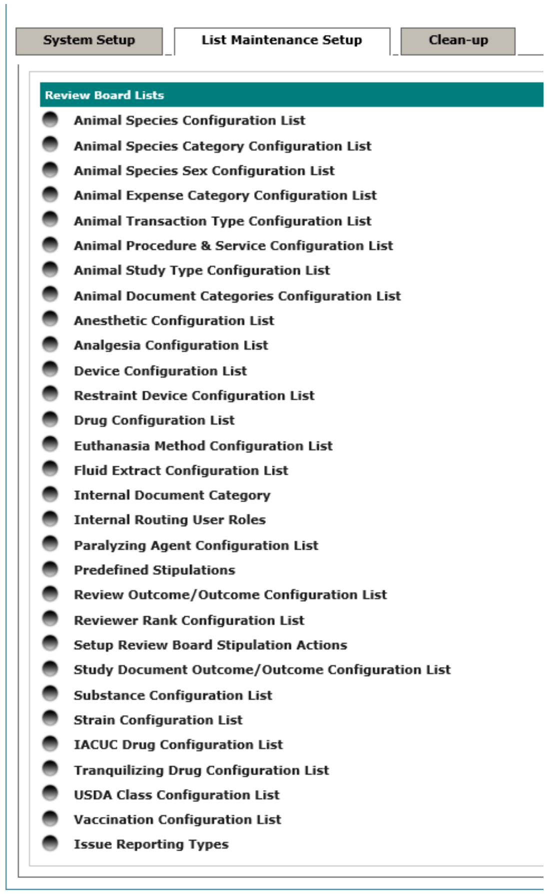
The iRIS™ system provides tools for creation of editable, boilerplate Review Board Administration and system notifications.

For more information about any of the functions shown in the **Review Board Notification Setup** section of the screenshot below, see the Animal Resource Center — Review Board Administration Notifications manual.



List Maintenance Setup Tab

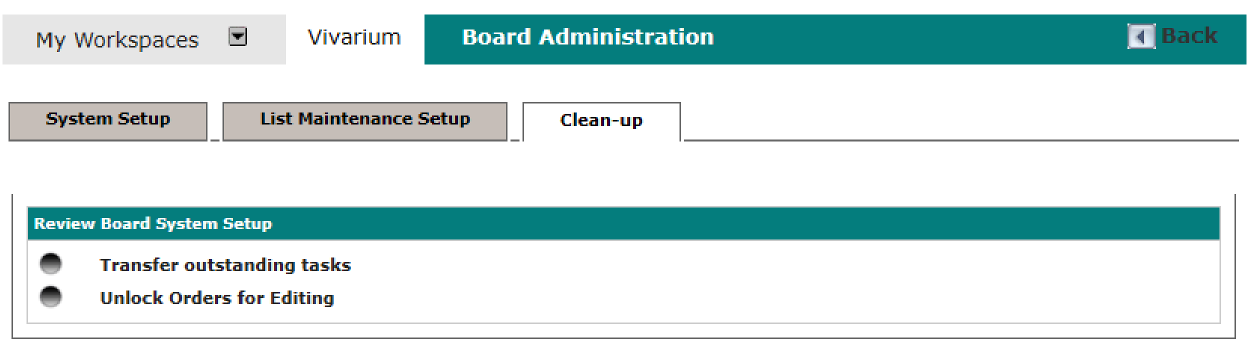
The **List Maintenance Setup** tab under Animal Resource Center > Review Board Administration contains a list of configurable dropdown lists for use in iRIS™.



For more information, see the Animal Resource Center — List Maintenance manual.

Clean-up Tab

The **Clean-up** tab under Animal Resource Center > Review Board Administration provides access to pages that allow the system administrator to transfer tasks among staff members and unlock orders for editing.

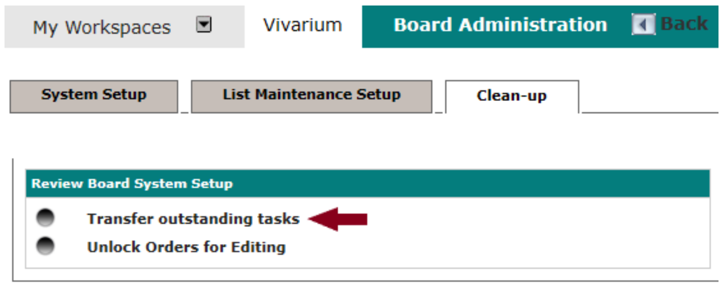


Transfer outstanding tasks

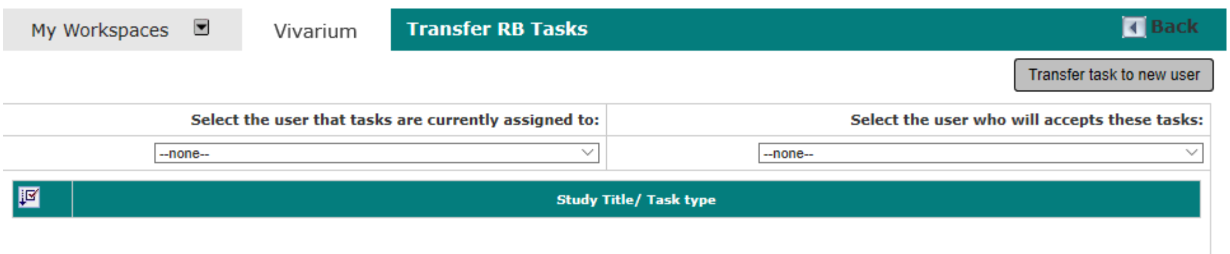
When a Coordinator leaves the institution, tasks assigned to that user must be reassigned to a different user in order to avoid any breaks in study processing continuity.

IMPORTANT: the iRIS™ user profile for the Coordinator whose tasks are being reassigned must still exist in the system, and that user must be designated as a Coordinator.

This process is completed on the **Transfer RB Tasks** page. To access the page, navigate to Animal Resource Center > Review Board Administration > Clean-up tab > **Transfer outstanding tasks** link.

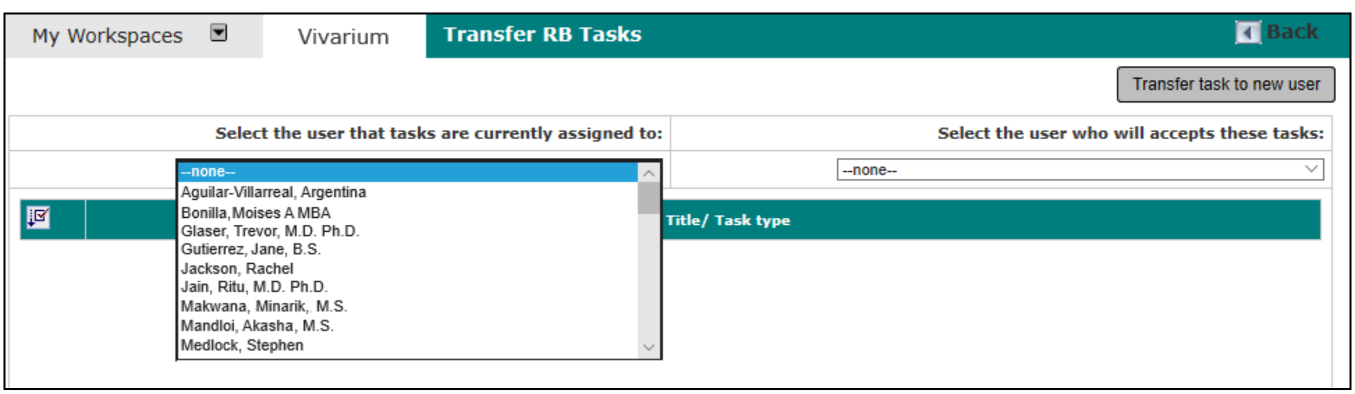


The **Transfer RB Tasks** page opens, as shown below.



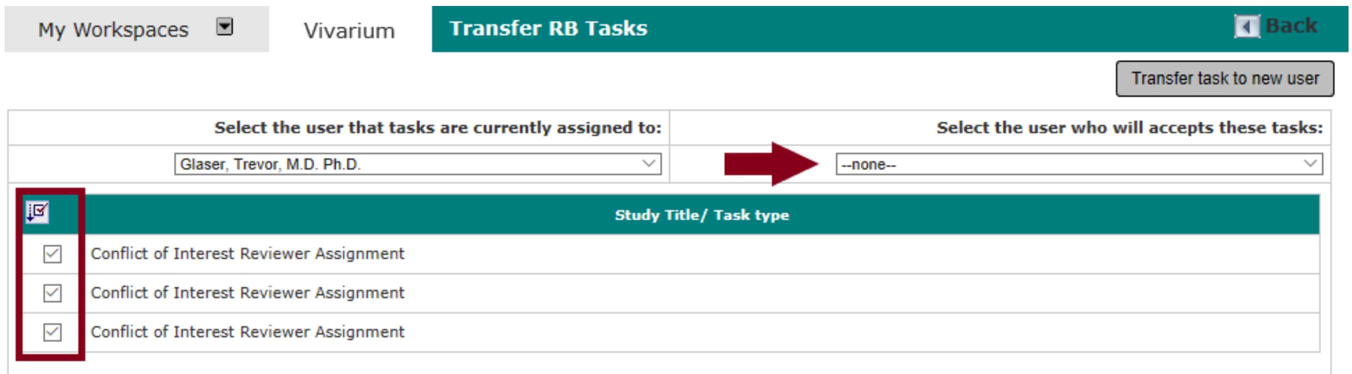
Here, the System Administrator or designee can look up a Coordinator name, view tasks assigned to that Coordinator, and reassign them individually or in a group to one or more other, active Coordinators in the system.

Click in the **Select the user that tasks are currently assigned to** field to open a dropdown list of users assigned to the role of Coordinator.



Click an item in the list to select the name of the Coordinator whose tasks are to be reassigned.

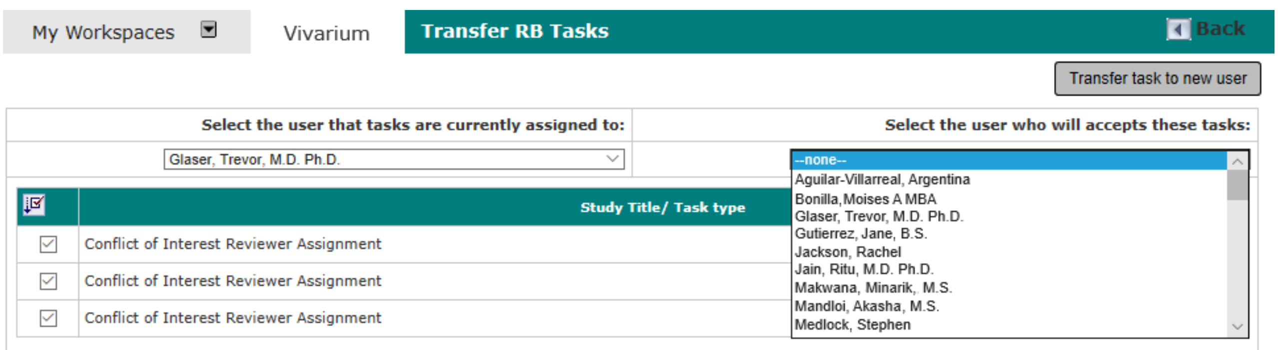
As shown below, all tasks currently assigned to the selected Coordinator populate in the **Study Title/ Task type** list.



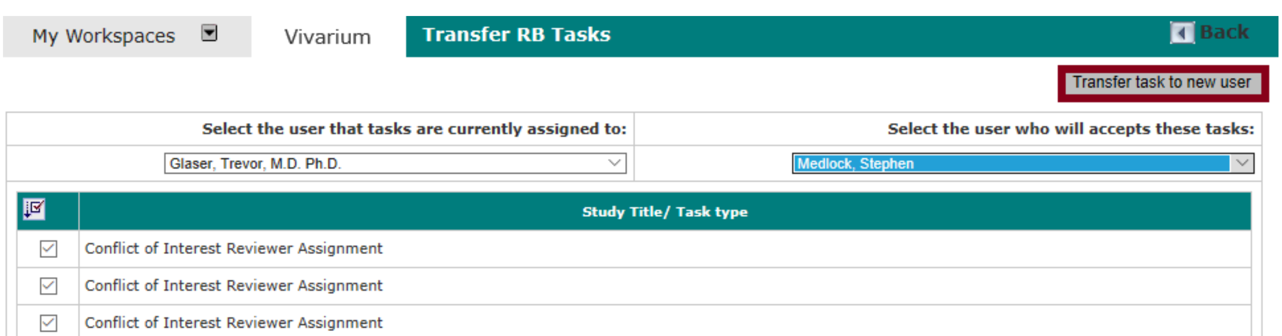
Select the checkbox(es) for the task(s) to be reassigned to a different Coordinator.

Note that in the example above all tasks are selected, but individual tasks can also be reassigned to different Coordinators by selecting a single task and repeating the process of reassignment multiple times.

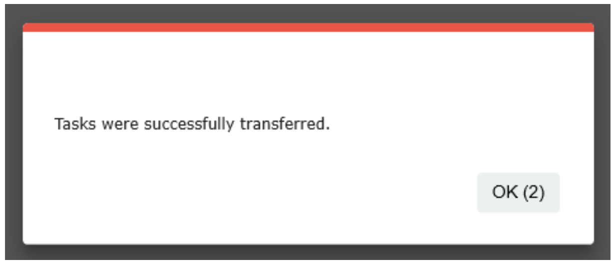
Click in the **Select the user who will accepts these tasks** field to open a dropdown list of users currently assigned to the role of Coordinator.



Click an item in the list to select the name of the Coordinator to whom the selected task(s) is(are) to be reassigned, then click the **Transfer task to new user** button.



A confirmation popup briefly displays, then closes automatically when its countdown timer expires.

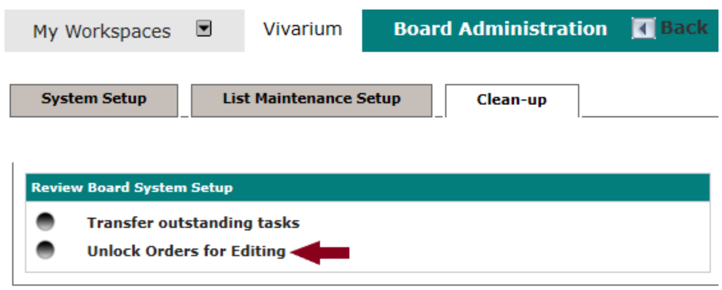


The reassigned tasks will now appear in the Workspace(s) of the new assignee(s).

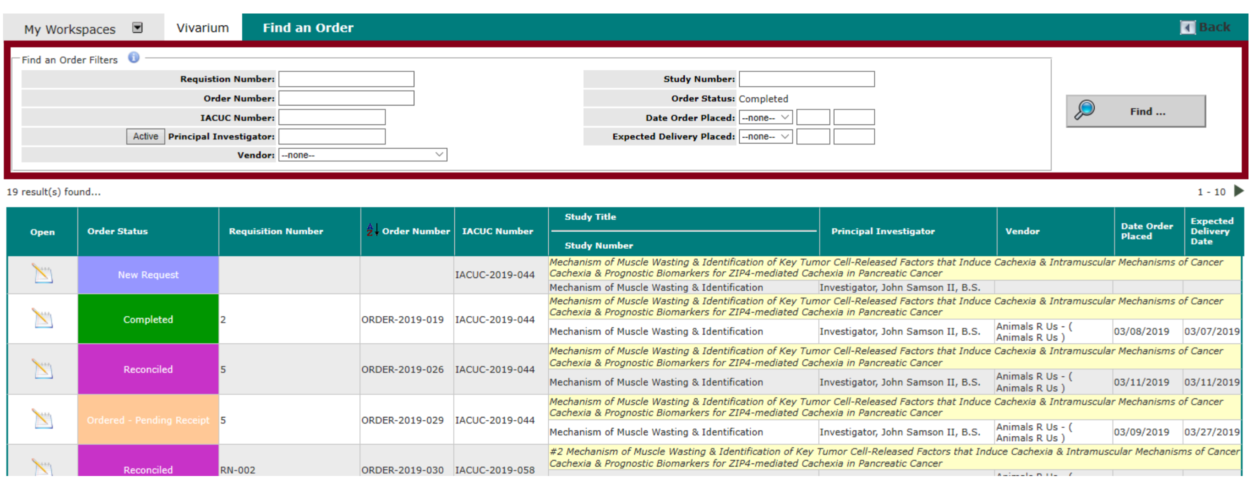
Unlock Orders for Editing

Animal, supply and service orders are automatically locked in the iRIS™ system at certain stages of order and billing processing, such as following ledger reconciliation. When an error or needed change is discovered in a locked order, the System Administrator or designee can unlock the order to enable editing.

This process is completed via the **Unlock Orders for Editing** link under Animal Resource Center > Review Board Administration > Clean-up tab.



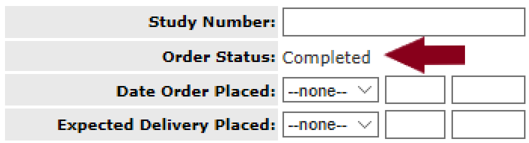
The **Find an Order** page opens, as shown below. An **Open** column is provided to open orders for viewing (see the ARC Orders and Billing Processing manual for order processing details), and a **Find an Order Filters** form is provided at the top of the page for entry of search criteria.



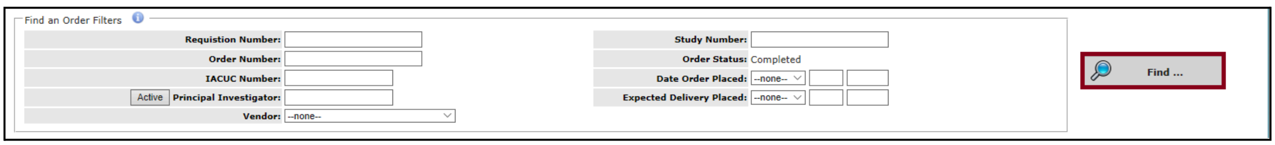
The **Find an Order Filters** form is shown in isolation for the remainder of this section.

The **Find an Order Filters** form is shown in isolation for the remainder of this section.

Notice that by default the **Order Status** search field is set to "Completed", indicating that regardless of other search criteria entered only Completed orders will be included in the result set.



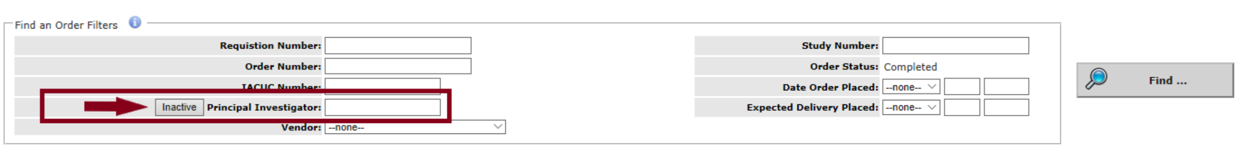
Orders can be searched by any combination of the fields in the **Find an Order Filters** section. Enter desired criteria (see details, following screenshot below) and click the **Find** button.



Text entry fields are provided to search by full or partial **Requisition Number**, **Order Number**, **IACUC Number** and/or **Study / Protocol Number**.

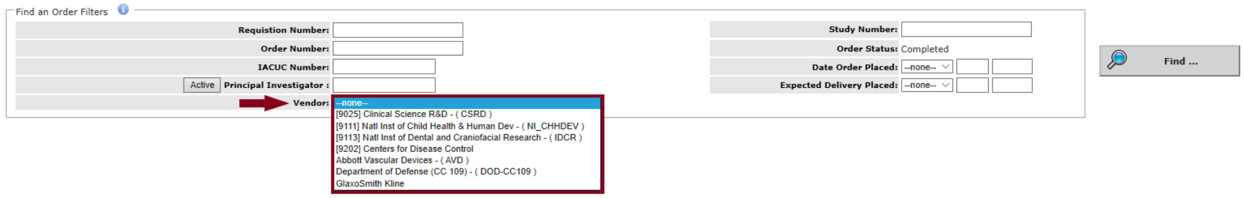
The **Principal Investigator** (PI) text entry field can be used to search by full or partial PI name and includes a button to toggle the search between **Active** or **Inactive** PIs. As shown below, the button is toggled to **Active** by default.

Click the **Active** button to toggle it to **Inactive**, as shown below.



*Note that it is not possible to search by both **Active** and **Inactive** PIs simultaneously.*

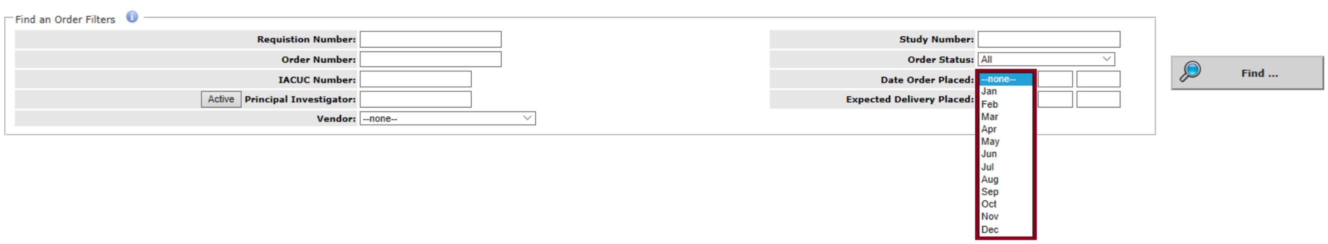
As shown below, the **Vendor** dropdown provides a picklist to filter the search by vendor name. Click an item in the list to select it.



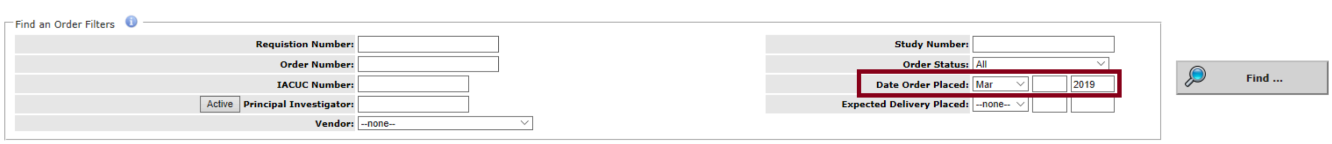
*Note that available **Vendor** names are configured under Animal Resource Center > Review Board Administration > System Setup tab > Setup Business Associate List link.*

As shown below, two options are provided for searching by date: **Date Order Placed** and **Expected Delivery Placed** (expected delivery date). Functionality is the same for both.

Click in the first field to open a dropdown list of months. Click the applicable month to select it.



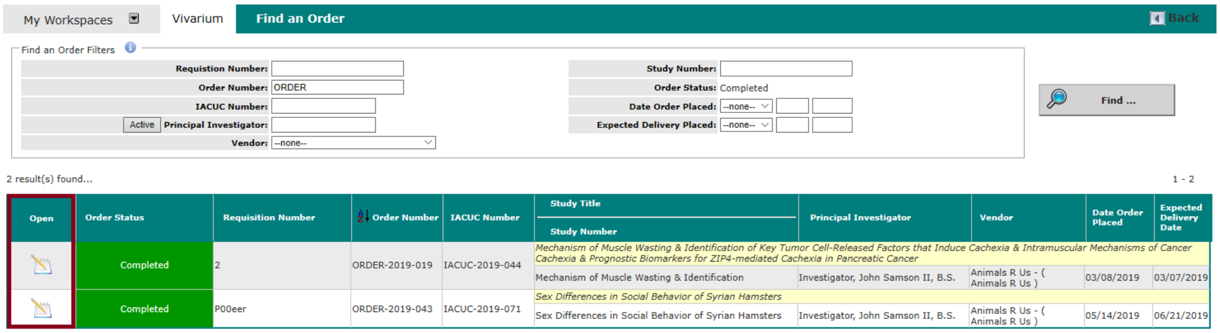
To search for orders placed on a specific day, enter the desired day of the month in the second field and the four-digit year in the last field. To search for orders placed on *any* day in a certain month, leave the center (day) field blank and enter the desired four-digit year in the last field, as shown below.



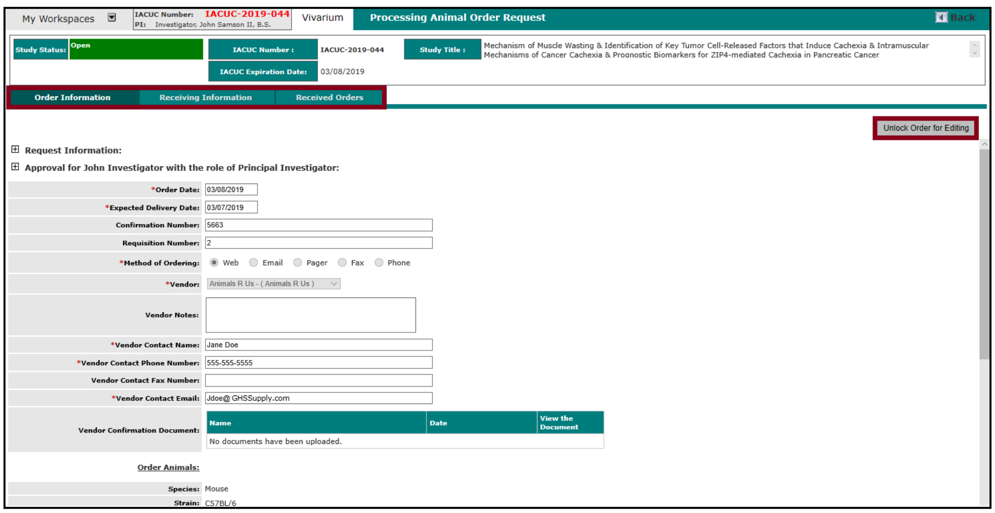
After all desired criteria are entered click the **Find** button to load results in the lower part of the **Find an Order** page.

Clear all **Find an Order Filters** fields and click the **Find** button again to clear search criteria.

Click the icon in the **Open** column for the applicable order.



The order is opened as view-only.



Notice that the order opens in the **Order Information** tab by default. **Receiving Information** and **Received Orders** tabs are also available. All fields on all three tabs are locked by default.

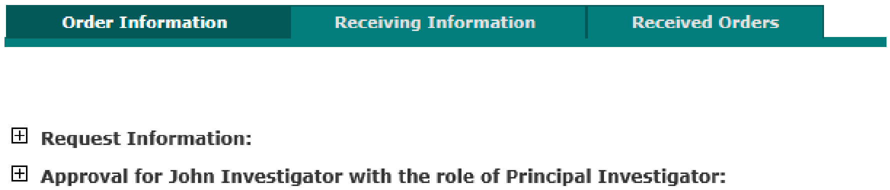
Click the **Unlock Order for Editing** button to unlock all editable fields on the **Order Information** and **Receiving Information** tabs. All fields on the **Received Orders** tab remain locked.

Note fields with dependencies on, or from, other system functions remain locked even after the overall Order is unlocked for editing.

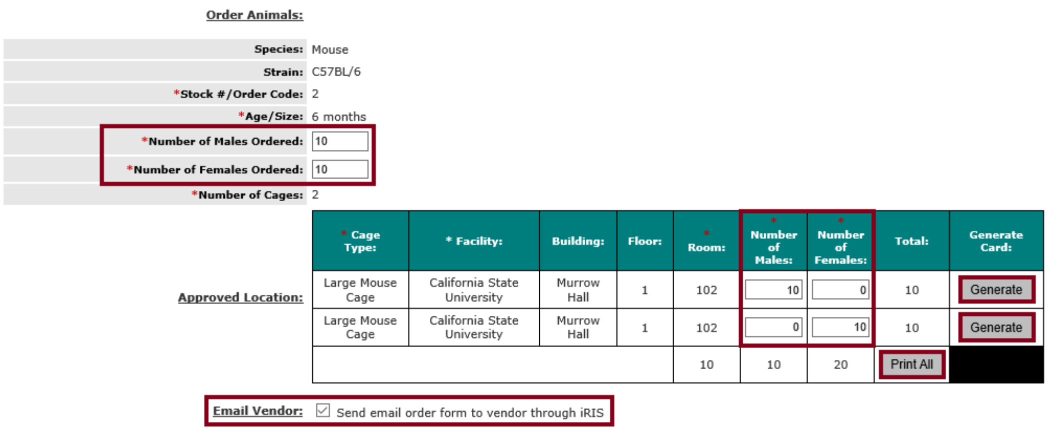
Items that are unlocked for editing in each tab are detailed in the subsections below.

Order Information Tab Unlocked Fields

Request Information and **Approval for [name] with the role of [role]** sections can be expanded, but fields and controls in those sections remain locked.

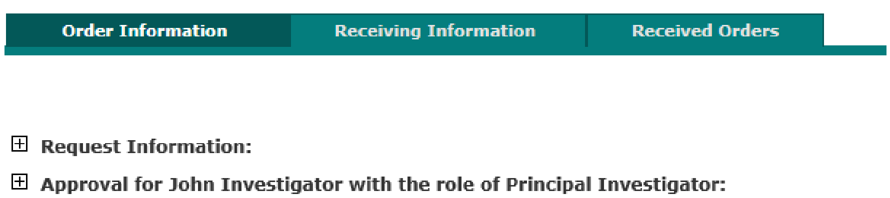


As shown in the screenshot below, the only sections of the main **Order Information** tab where fields are unlocked are **Order Animals, Approved Location** and **Email Vendor**. Fields boxed in red are unlocked for editing and buttons boxed in red are activated.

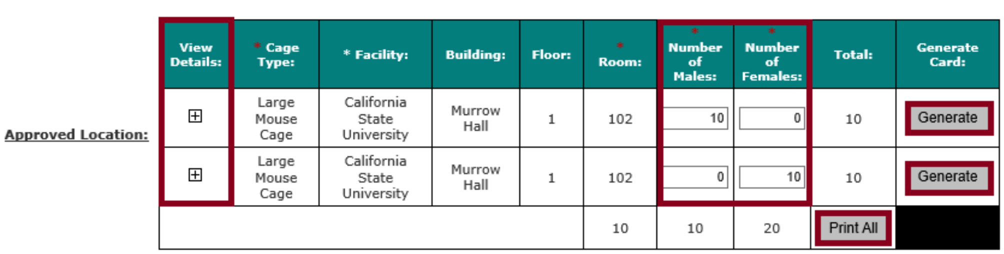


Receiving Information Tab Unlocked Fields

The **Request Information** and **Approval for [name] with the role of [role]** sections can be expanded, but fields and controls in those sections remain locked.



As shown in the screenshot below, the only section of the main **Receiving Information** tab where fields are unlocked is **Approved Location**. Fields boxed in red are unlocked for editing and buttons boxed in red are activated.



Notice that the icons in the **View Details** column of the section are active, and additional fields are unlocked within the detail sections of the table.

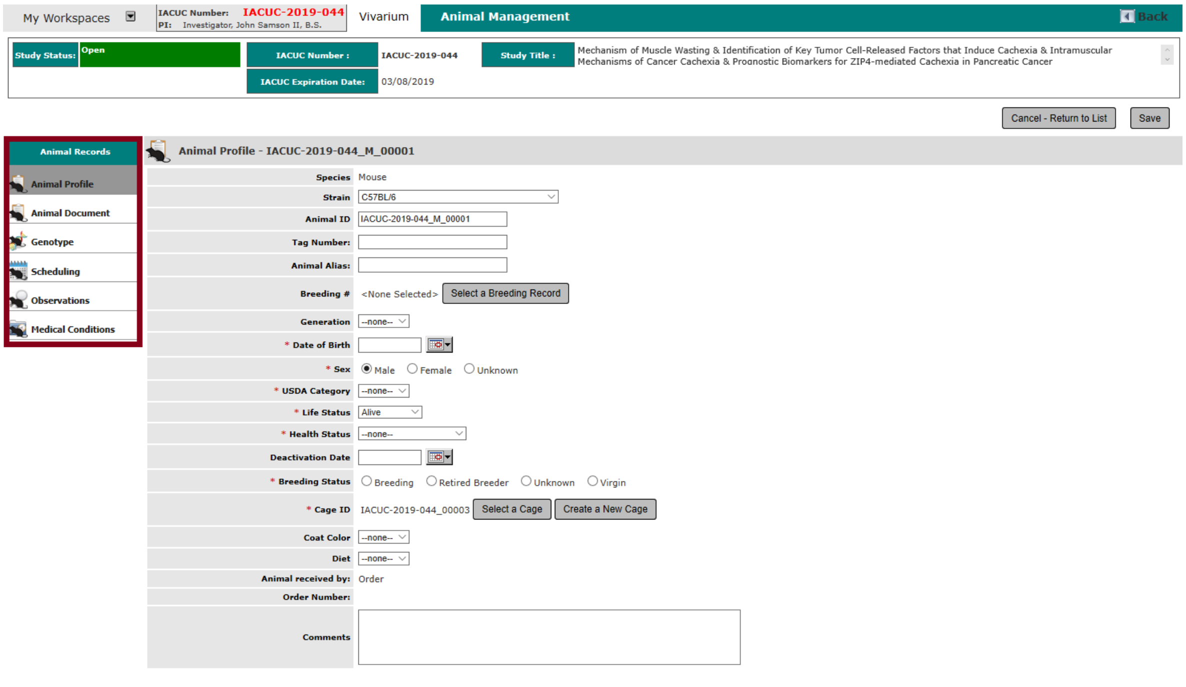
Click the plus sign in the **View Details** column for the applicable row in the Approved Location table to access records for individual animals assigned to each cage, as shown below.


Approved Location:

View Details:	* Cage Type:	* Facility:	Building:	Floor:	* Room:	* Number of Males:	* Number of Females:	Total:	Generate Card:
⊟	Large Mouse Cage	California State University	Murrow Hall	1	102	10	0	10	Generate

Edit	Animal ID Tag Number	Sex	DOB	Cage ID	Animal received by	Order Number
	IACUC-2019-044_M_00001	Male		IACUC-2019-044_00001	Order	ORDER-2019-019
	IACUC-2019-044_M_00002	Male		IACUC-2019-044_00001	Order	ORDER-2019-019
	IACUC-2019-044_M_00003	Male		IACUC-2019-044_00001	Order	ORDER-2019-019
	IACUC-2019-044_M_00004	Male		IACUC-2019-044_00001	Order	ORDER-2019-019
	IACUC-2019-044_M_00005	Male		IACUC-2019-044_00001	Order	ORDER-2019-019
	IACUC-2019-044_M_00006	Male		IACUC-2019-044_00001	Order	ORDER-2019-019
	IACUC-2019-044_M_00007	Male		IACUC-2019-	Order	ORDER-2019-019

Click the icon in the **Edit** column for the applicable animal. As shown below, the Animal Profile record is opened for editing, with all tabs and data entry fields unlocked.


My Workspaces
IACUC Number: IACUC-2019-044
PI: Investigator, John Samson II, B.S.
Vivarium
Animal Management
Back
Study Status: Open
IACUC Number : IACUC-2019-044
Study Title : Mechanism of Muscle Wasting & Identification of Key Tumor Cell-Released Factors that Induce Cachexia & Intramuscular Mechanisms of Cancer Cachexia & Prognostic Biomarkers for ZIP4-mediated Cachexia in Pancreatic Cancer
IACUC Expiration Date: 03/08/2019
Cancel - Return to List
Save
Animal Records
Animal Profile
Animal Document
Genotype
Scheduling
Observations
Medical Conditions
Animal Profile - IACUC-2019-044_M_00001
Species Mouse
Strain C57BL/6
Animal ID IACUC-2019-044_M_00001
Tag Number:
Animal Alias:
Breeding # <None Selected> Select a Breeding Record
Generation --none--
* Date of Birth
* Sex Male Female Unknown
* USDA Category --none--
* Life Status Alive
* Health Status --none--
Deactivation Date
* Breeding Status Breeding Retired Breeder Unknown Virgin
* Cage ID IACUC-2019-044_00003 Select a Cage Create a New Cage
Coat Color --none--
Diet --none--
Animal received by: Order
Order Number:
Comments