



## ANIMAL RESOURCE CENTER

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### *Cages*

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## Introduction

The iRIS™ system includes 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 customized, barcoded cage cards.

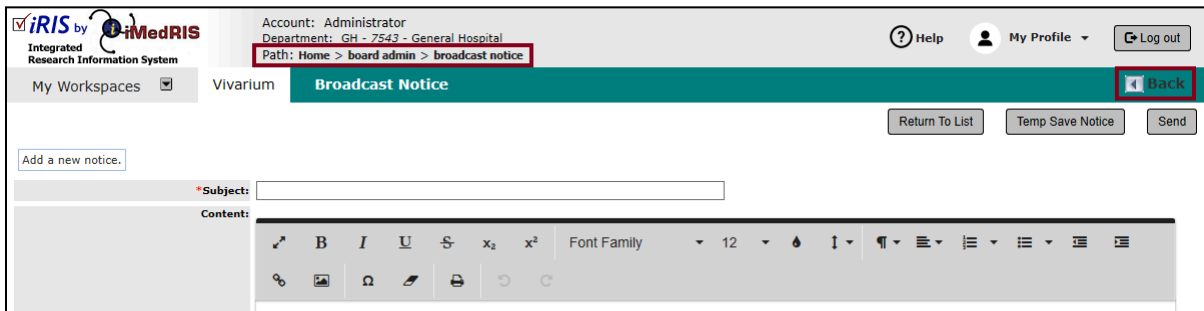
## Navigation in iRIS™

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.

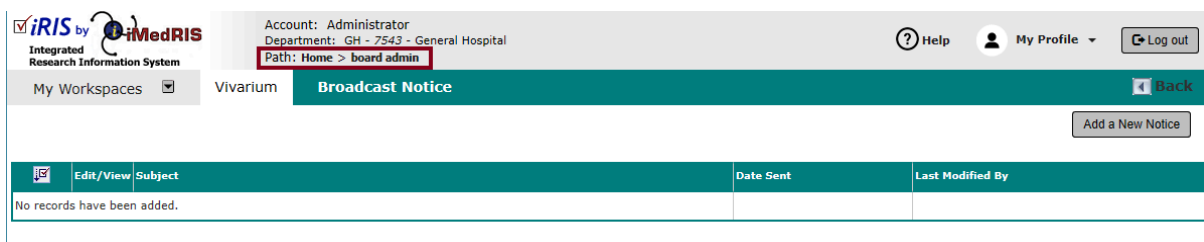
## Path Directory Tree

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

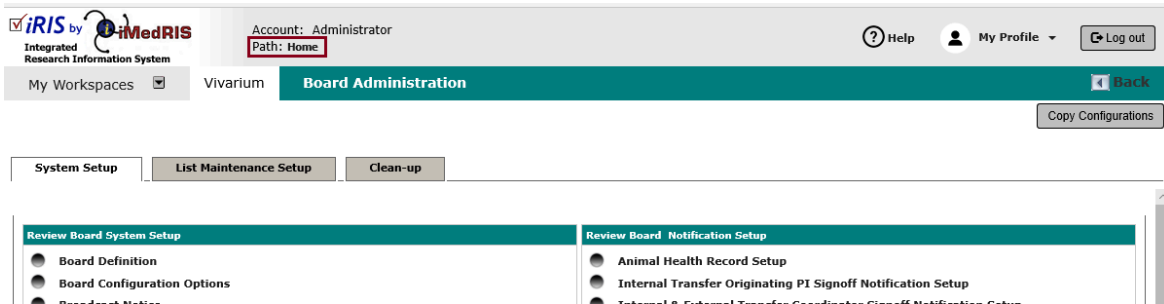
In the example shown the user is viewing the **Broadcast Notice Add a new notice** page. This page is nested three levels beneath the main workspace page, as indicated by the three links available in the **Path** directory tree: **Home**, **board admin** and **broadcast notice**.



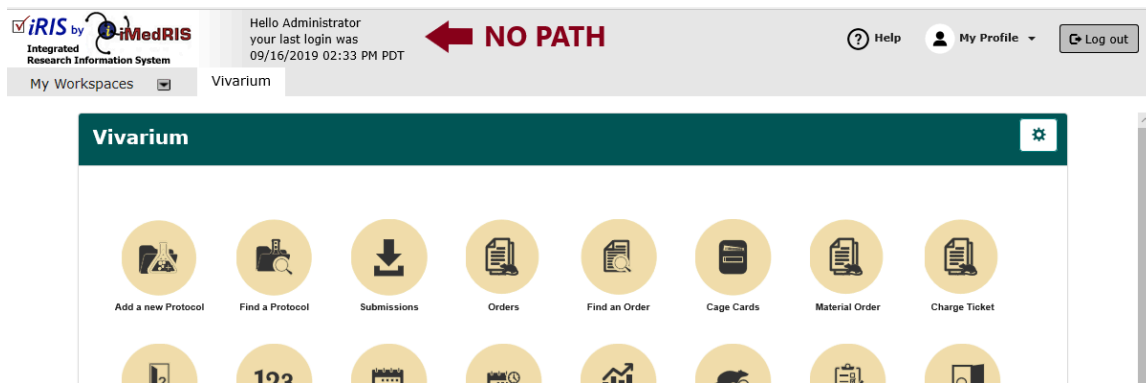
Click on **broadcast notice** in the **Path** to navigate up one level in the directory tree, to the main **Broadcast Notice** page. There are now two levels in the **Path** directory tree: **board admin** and **Home**.



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**.

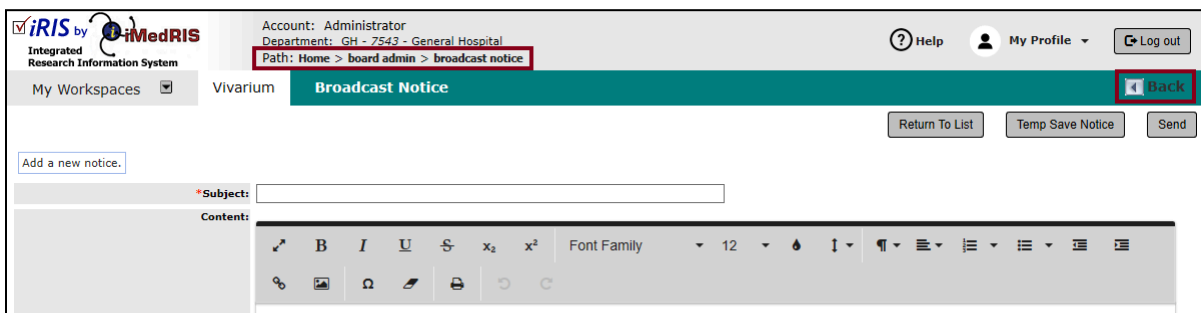


Click on **Home** in the **Path** to navigate up one level in the directory tree, to the main Workspace page. No Path item is displayed here because the user is now at the top-most level of the directory tree.

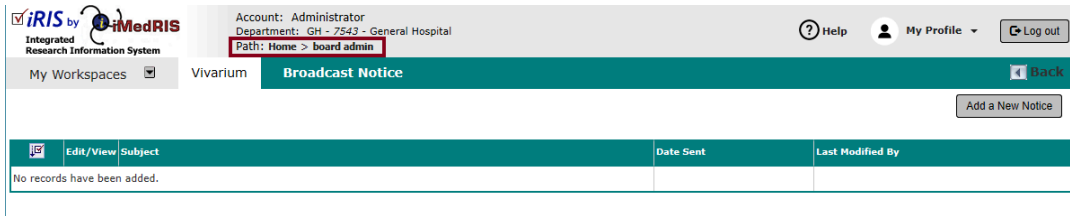


## Back Button

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:



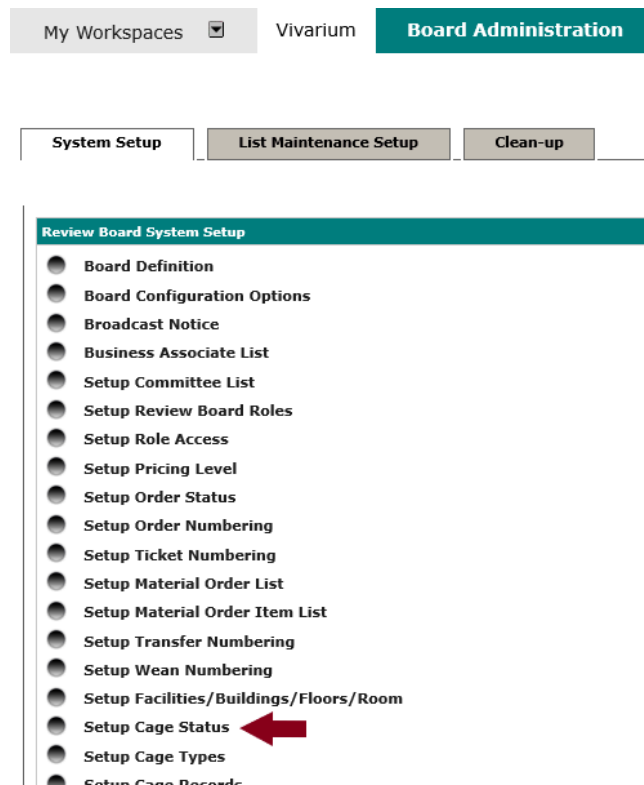
Clicking the **Back** button on the **Broadcast Notice** page returns the user to the Board Administration page, as indicated by the last link in the **Path** directory tree shown in the screenshot above.

*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.*

## Setup Cage Status

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

To begin, navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Cage Status** link.



The **Setup Cage Status** page opens.

My Workspaces Vivarium **Setup Cage Status** Back

Add a New Cage Status Delete selected Cage Status

	Edit	Cage Status	Reserved	Allow Edits	Color
		Active	Yes	Yes	Active
		Quarantine	Yes	No	Quarantine
		Retired	Yes	Yes	Retired
		Transferred	Yes	Yes	Transferred

The **Cage Status** items shown in the screenshot above are system default entries, marked “Yes” in the **Reserved** column. These statuses can be edited, but **Reserved** statuses cannot be deleted.

### Edit Cage Status

To edit a cage status, navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Cage Status** link.

My Workspaces Vivarium **Board Administration**

System Setup List Maintenance Setup Clean-up





**Review Board System Setup**

- Board Definition
- Board Configuration Options
- Broadcast Notice
- Business Associate List
- Setup Committee List
- Setup Review Board Roles
- Setup Role Access
- Setup Pricing Level
- Setup Order Status
- Setup Order Numbering
- Setup Ticket Numbering
- Setup Material Order List
- Setup Material Order Item List
- Setup Transfer Numbering
- Setup Wean Numbering
- Setup Facilities/Buildings/Floors/Room
- Setup Cage Status
- Setup Cage Types
- Setup Cage Records

The **Setup Cage Status** page opens.

My Workspaces ▼ Vivarium **Setup Cage Status** ◀ Back

Add a New Cage Status Delete selected Cage Status


<input type="checkbox"/>	Edit	Cage Status	Reserved	Allow Edits	Color
<input type="checkbox"/>		Active	Yes	Yes	Active
<input type="checkbox"/>		Quarantine	Yes	No	Quarantine
<input type="checkbox"/>		Retired	Yes	Yes	Retired
<input type="checkbox"/>		Transferred	Yes	Yes	Transferred

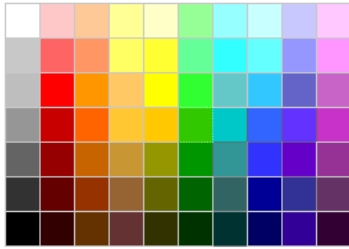
Click the icon in the **Edit** column to edit the desired **Cage Status**. An edit panel opens for the **Cage Status**.

My Workspaces ▼ Vivarium **Setup Cage Status** ◀ Back

Save Cage Status

\*Cage Status:

Color: 



Allow Edits:  Yes  No

In the example above the first **Cage Status** record, “Active”, is open for editing.

**Cage Status** is the name of the status.

**Color** sets a background color for this cage status wherever it appears in system pages. A preview box displays the color currently selected for the status. To change it, click on the desired color swatch in the grid to the right of the preview box.

Set **Allow Edits** to “Yes” to allow study personnel to revise **Name** and **Color** settings for this status going forward. Set **Allow Edits** to “No” to limit status changes to iRIS™ system administrators.

When desired changes are complete, click the **Save Cage Status** button to save changes.

### Add Cage Status

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

My Workspaces ▾ Vivarium **Board Administration**

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

**Review Board System Setup**

- Board Definition
- Board Configuration Options
- Broadcast Notice
- Business Associate List
- Setup Committee List
- Setup Review Board Roles
- Setup Role Access
- Setup Pricing Level
- Setup Order Status
- Setup Order Numbering
- Setup Ticket Numbering
- Setup Material Order List
- Setup Material Order Item List
- Setup Transfer Numbering
- Setup Wean Numbering
- Setup Facilities/Buildings/Floors/Room
- **Setup Cage Status** ←
- Setup Cage Types
- Setup Cage Records

The **Setup Cage Status** page opens.

My Workspaces ▾ Vivarium **Setup Cage Status** Back

Add a New Cage Status | Delete selected Cage Status

✎	Edit	Cage Status	Reserved	Allow Edits	Color
		Active	Yes	Yes	Active
		Quarantine	Yes	No	Quarantine
		Retired	Yes	Yes	Retired
		Transferred	Yes	Yes	Transferred

Click the **Add a New Cage Status** button. A panel opens for creation of a new cage status.

My Workspaces ▾ Vivarium **Setup Cage Status** Back

Save Cage Status

\*Cage Status:

Colors:

Allow Edits:  Yes  No

Enter the desired **Cage Status** name (e.g., “Alternate”, “Treatment Holding”, etc.). The name chosen should be descriptive and should not duplicate any existing statuses.

**Color** sets a background color for this cage status wherever it appears in system pages. A preview box displays the color currently selected for the status. To change it, click on the desired color swatch in the grid to the right of the preview box.

Set **Allow Edits** to “Yes” to allow study personnel to revise **Name** and **Color** settings for this status going forward. Set **Allow Edits** to “No” to limit status changes to iRIS™ system administrators.

In the screenshot below, an example of the filled form is shown. When desired changes are complete, click the **Save Cage Status** button to save the new status.

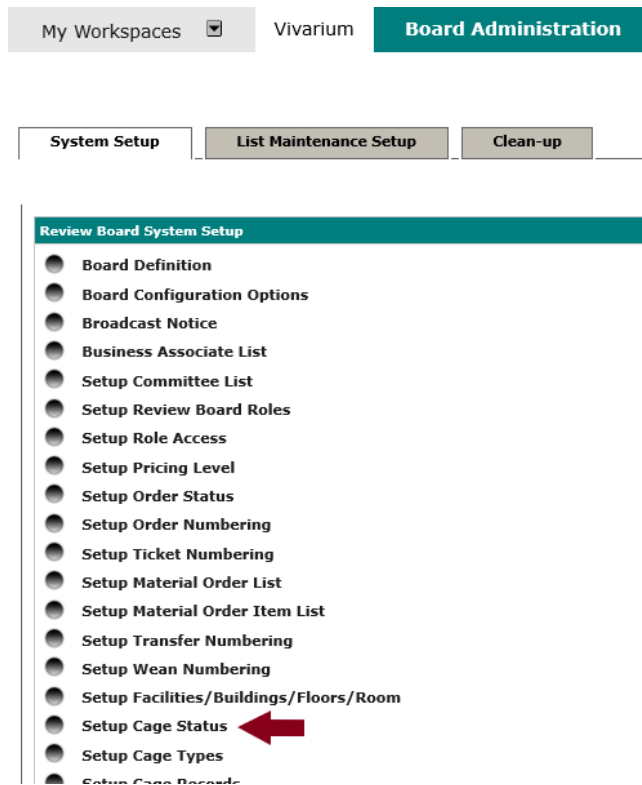
As shown below, the new record is added to the **Setup Cage Status** list.

	Edit	Cage Status	Reserved	Allow Edits	Color
<input type="checkbox"/>		Active	Yes	Yes	Active
<input type="checkbox"/>		Quarantine	Yes	No	Quarantine
<input type="checkbox"/>		Retired	Yes	Yes	Retired
<input type="checkbox"/>		Transferred	Yes	Yes	Transferred
<input type="checkbox"/>		Treatment Holding	No	No	Treatment Holding

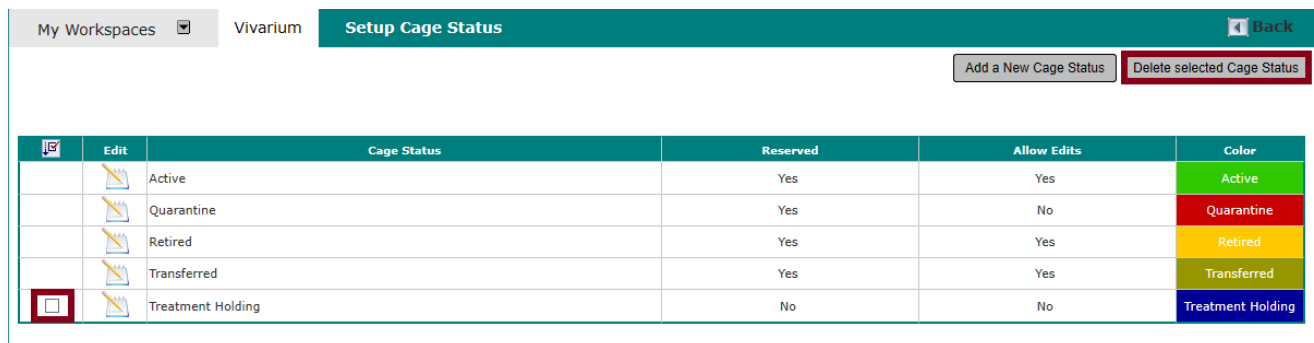
Note the select box at far left for the new **Cage Status**, and that “No” has been populated in the **Reserved** column for this status. Because this is not a **Reserved** status, it can be deleted.

## Delete Cage Status

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

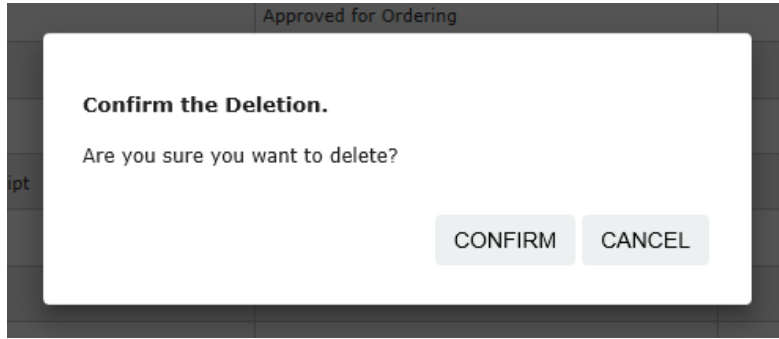


The **Setup Cage Status** page opens.



Select the checkbox to the left of the status to be deleted and click the **Delete selected Cage Status** button.

A confirmation popup window displays.

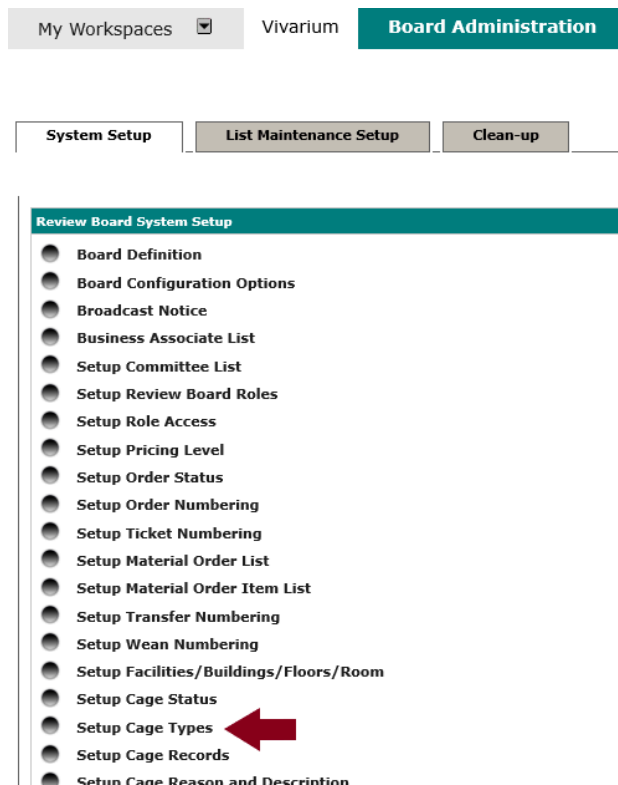


Click **CONFIRM** to delete the record and return to the **Setup Cage Status** page. Click **CANCEL** to return to the **Setup Cage Status** page without deleting the record.

## Setup Cage Types

The iRIS™ system allows for setup, tracking and management of a variety of cage types for animal subjects.

To begin, navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Cage Types** link.



The **Setup Cage Types** page opens.

My Workspaces ▼ Vivarium **Setup Cage Types** ⌂ Back

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

<input type="checkbox"/>	Edit	Cage Type	Species	Size(Floor Space)	Max. Animals Per Cage	Per Diem by	Is Default for Selected Species
<input type="checkbox"/>		Crow Medium Cage	American crow	10.00	10	Cage	Yes
<input type="checkbox"/>		Bird Cage	Bird	5.00	5	Cage	Yes
<input type="checkbox"/>		Canine	Canine	20.00	3	Cage	Yes
<input type="checkbox"/>		Canine small	Canine	10.00	2	Cage	No
<input type="checkbox"/>		Large Goat cage	Goat	1.00	1	Cage	Yes
<input type="checkbox"/>		Large Mouse Cage	Mouse	100.00	25	Cage	Yes
<input type="checkbox"/>		Type A (Small)	Mouse	2.00	2	Cage	No
<input type="checkbox"/>		Large Pig Cage	Pig	200.00	7	Cage	No
<input type="checkbox"/>		Small Pig Cage	Pig	50.00	2	Cage	Yes

### Edit Cage Type

To edit a cage type, navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Cage Types** link.

My Workspaces ▼ Vivarium **Board Administration**

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

**Review Board System Setup**

- Board Definition
- Board Configuration Options
- Broadcast Notice
- Business Associate List
- Setup Committee List
- Setup Review Board Roles
- Setup Role Access
- Setup Pricing Level
- Setup Order Status
- Setup Order Numbering
- Setup Ticket Numbering
- Setup Material Order List
- Setup Material Order Item List
- Setup Transfer Numbering
- Setup Wean Numbering
- Setup Facilities/Buildings/Floors/Room
- Setup Cage Status
- **Setup Cage Types**
- Setup Cage Records
- Setup Cage Reason and Description

The **Setup Cage Types** page opens.

My Workspaces		Vivarium		Setup Cage Types				Back
<input type="checkbox"/>	Edit	Cage Type	Species	Size(Floor Space)	Max. Animals Per Cage	Per Diem by	Is Default for Selected Species	
<input type="checkbox"/>		Crow Medium Cage	American crow	10.00	10	Cage	Yes	
<input type="checkbox"/>		Bird Cage	Bird	5.00	5	Cage	Yes	
<input type="checkbox"/>		Canine	Canine	20.00	3	Cage	Yes	
<input type="checkbox"/>		Canine small	Canine	10.00	2	Cage	No	
<input type="checkbox"/>		Large Goat cage	Goat	1.00	1	Cage	Yes	
<input type="checkbox"/>		Large Mouse Cage	Mouse	100.00	25	Cage	Yes	
<input type="checkbox"/>		Type A (Small)	Mouse	2.00	2	Cage	No	
<input type="checkbox"/>		Large Pig Cage	Pig	200.00	7	Cage	No	
<input type="checkbox"/>		Small Pig Cage	Pig	50.00	2	Cage	Yes	

Click the icon in the **Edit** column to edit the desired **Cage Type**. An edit panel opens for the **Cage Type**.

My Workspaces ▼ Vivarium **Setup Cage Types** ← Back

Save Type

**\*Cage Type:** Crow Medium Cage

**\*Species:** American crow ▼

**\*Cage Size:** 10.00

**\*Max. Animals Per Cage:** 10

**\*Per Diem By:** Cage ▼

**Is default cage for selected species?**  Yes  No

In the example above the first **Cage Type** record, “Crow Medium Cage”, is open for editing.

**Cage Type** is the name for the type. Note that this field cannot be edited.

**Species** is used to indicate the type of animal subject to occupy the cage. This list is maintained by an iRIS™ system administrator under ARC > Review Board Administration > [List Maintenance Setup tab] > [Animal Species Configuration List link]. Select the desired **Species** from the dropdown list by clicking on it.

**\*Species:** American crow

**Cage Size:** Avian (Duck)

**Per Cage:** Axis deer

**Per Diem By:** Bird

**Is default cage for selected species?:** Canine

Drosophila

Goat

Guinea Pig

Mouse

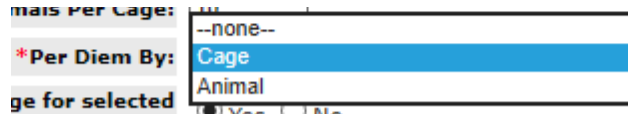
mouse II

Syrian hamsters

The **Cage Size** field is used to indicate how many square feet of floor space are required to accommodate the cage. Number formatting (e.g., decimal places) for this field is configurable by the system administrator.

**Max. Animals Per Cage** specifies the maximum number of animal subjects that can occupy the cage.

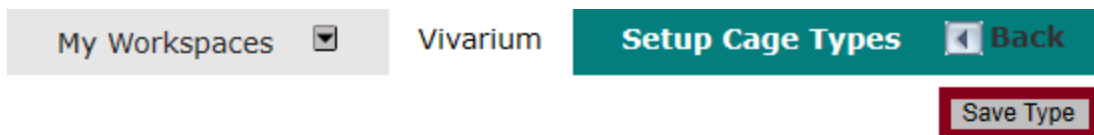
Select “Cage” or “Animal” in the **Per Diem By** dropdown list to specify whether expenses are to be assigned to the cage or to the individual animal subjects occupying the cage.



Select “Yes” or “No” for **Is default cage for selected species?** Note that only one cage type can be set as the default for the selected species, an error popup window will display when the record is saved if this field is set to “Yes” when another cage type has already been set as the default for the selected species. Refer to the main **Setup Cage Types** page to see which cage types have been set as a default for a species.

<input type="checkbox"/>	Edit	Cage Type	Species	Size(Floor Space)	Max. Animals Per Cage	Per Diem by	Is Default for Selected Species
<input type="checkbox"/>		Crow Medium Cage	American crow	10.00	10	Cage	Yes
<input type="checkbox"/>		Bird Cage	Bird	5.00	5	Cage	Yes
<input type="checkbox"/>		Canine	Canine	20.00	3	Cage	Yes
<input type="checkbox"/>		Canine small	Canine	10.00	2	Cage	No
<input type="checkbox"/>		Large Goat cage	Goat	1.00	1	Cage	Yes
<input type="checkbox"/>		Large Mouse Cage	Mouse	100.00	25	Cage	Yes
<input type="checkbox"/>		Type A (Small)	Mouse	2.00	2	Cage	No
<input type="checkbox"/>		Large Pig Cage	Pig	200.00	7	Cage	No
<input type="checkbox"/>		Small Pig Cage	Pig	50.00	2	Cage	Yes

When desired changes are complete, click the **Save Type** button to save the record.



\*Cage Type: Crow Medium Cage

\*Species: American crow

\*Cage Size: 10.00

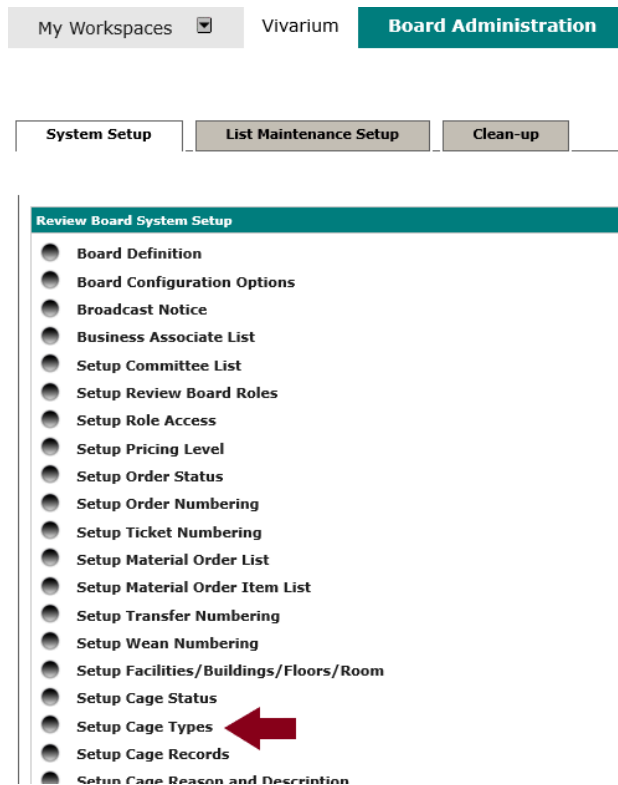
\*Max. Animals Per Cage: 10

\*Per Diem By: Cage

Is default cage for selected species?  Yes  No

## Add Cage Type

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



The **Setup Cage Types** page opens.

The screenshot shows the 'Setup Cage Types' page. At the top, there are tabs for 'My Workspaces', 'Vivarium', and 'Setup Cage Types'. Below these are buttons for 'Add a New Cage Type' and 'Delete Cage Type(s)'. The main content is a table with the following data:

<input type="checkbox"/>	Edit	Cage Type	Species	Size(Floor Space)	Max. Animals Per Cage	Per Diem by	Is Default for Selected Species
<input type="checkbox"/>		Crow Medium Cage	American crow	10.00	10	Cage	Yes
<input type="checkbox"/>		Bird Cage	Bird	5.00	5	Cage	Yes
<input type="checkbox"/>		Canine	Canine	20.00	3	Cage	Yes
<input type="checkbox"/>		Canine small	Canine	10.00	2	Cage	No
<input type="checkbox"/>		Large Goat cage	Goat	1.00	1	Cage	Yes
<input type="checkbox"/>		Large Mouse Cage	Mouse	100.00	25	Cage	Yes
<input type="checkbox"/>		Type A (Small)	Mouse	2.00	2	Cage	No
<input type="checkbox"/>		Large Pig Cage	Pig	200.00	7	Cage	No
<input type="checkbox"/>		Small Pig Cage	Pig	50.00	2	Cage	Yes

Click the **Add a New Cage Type** button. A panel opens for creation of a new cage type.

**Cage Type** is the name for the type. Note that this field cannot be edited after the record is saved.

**Species** is used to indicate the type of animal subject to occupy the cage. This list is maintained by an iRIS™ system administrator under ARC > Review Board Administration > [List Maintenance Setup tab] > [Animal Species Configuration List link]. Select the desired **Species** from the dropdown list by clicking on it.

The **Cage Size** field is used to indicate how many square feet of floor space are required to accommodate the cage. Number formatting (e.g., decimal places) for this field is configurable by the system administrator.

**Max. Animals Per Cage** specifies the maximum number of animal subjects that can occupy the cage.

Select “Cage” or “Animal” in the **Per Diem By** dropdown list to specify whether charges are to be assigned to the cage or to the individual animal subjects occupying the cage.

Select “Yes” or “No” for **Is default cage for selected species?** Note that only one cage type can be set as the default for the selected species, an error popup window will display when the record is saved if this field is set to “Yes” when another cage type has already been set as the default for the selected species. Refer to the main **Setup Cage Types** page to see which cage types have been set as a default for a species.

My Workspaces ▼ Vivarium **Setup Cage Types** ← Back

Add a New Cage Type Delete Cage Type(s)

<input type="checkbox"/>	Edit	Cage Type	Species	Size(Floor Space)	Max. Animals Per Cage	Per Diem by	Is Default for Selected Species
<input type="checkbox"/>		Crow Medium Cage	American crow	10.00	10	Cage	Yes
<input type="checkbox"/>		Bird Cage	Bird	5.00	5	Cage	Yes
<input type="checkbox"/>		Canine	Canine	20.00	3	Cage	Yes
<input type="checkbox"/>		Canine small	Canine	10.00	2	Cage	No
<input type="checkbox"/>		Large Goat cage	Goat	1.00	1	Cage	Yes
<input type="checkbox"/>		Large Mouse Cage	Mouse	100.00	25	Cage	Yes
<input type="checkbox"/>		Type A (Small)	Mouse	2.00	2	Cage	No
<input type="checkbox"/>		Large Pig Cage	Pig	200.00	7	Cage	No
<input type="checkbox"/>		Small Pig Cage	Pig	50.00	2	Cage	Yes

When desired entries are complete, click the **Save Type** button to save the record.

My Workspaces ▼ Vivarium **Setup Cage Types** ← Back

**Save Type**

**\*Cage Type:**

**\*Species:**

**\*Cage Size:**

**\*Max. Animals Per Cage:**

**\*Per Diem By:**

**Is default cage for selected species?**  Yes  No

As shown below, the new record is added to the **Setup Cage Types** list.

My Workspaces ▼ Vivarium **Setup Cage Types** ← Back

Add a New Cage Type Delete Cage Type(s)

<input type="checkbox"/>	Edit	Cage Type	Species	Size(Floor Space)	Max. Animals Per Cage	Per Diem by	Is Default for Selected Species
<input type="checkbox"/>		Crow Medium Cage	American crow	10.00	10	Cage	Yes
<input type="checkbox"/>		Bird Cage	Bird	5.00	5	Cage	Yes
<input type="checkbox"/>		Canine	Canine	20.00	3	Cage	Yes
<input type="checkbox"/>		Canine small	Canine	10.00	2	Cage	No
<input type="checkbox"/>		Drosophila Standard	Drosophila	1.00	200	Cage	Yes
<input type="checkbox"/>		Large Goat cage	Goat	1.00	1	Cage	Yes
<input type="checkbox"/>		Large Mouse Cage	Mouse	100.00	25	Cage	Yes
<input type="checkbox"/>		Type A (Small)	Mouse	2.00	2	Cage	No
<input type="checkbox"/>		Large Pig Cage	Pig	200.00	7	Cage	No
<input type="checkbox"/>		Small Pig Cage	Pig	50.00	2	Cage	Yes


### Delete Cage Type

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

My Workspaces ▼ Vivarium **Board Administration**

System Setup | List Maintenance Setup | Clean-up











**Review Board System Setup**

- Board Definition
- Board Configuration Options
- Broadcast Notice
- Business Associate List
- Setup Committee List
- Setup Review Board Roles
- Setup Role Access
- Setup Pricing Level
- Setup Order Status
- Setup Order Numbering
- Setup Ticket Numbering
- Setup Material Order List
- Setup Material Order Item List
- Setup Transfer Numbering
- Setup Wean Numbering
- Setup Facilities/Buildings/Floors/Room
- Setup Cage Status
- Setup Cage Types 
- Setup Cage Records
- Setup Cage Reason and Description

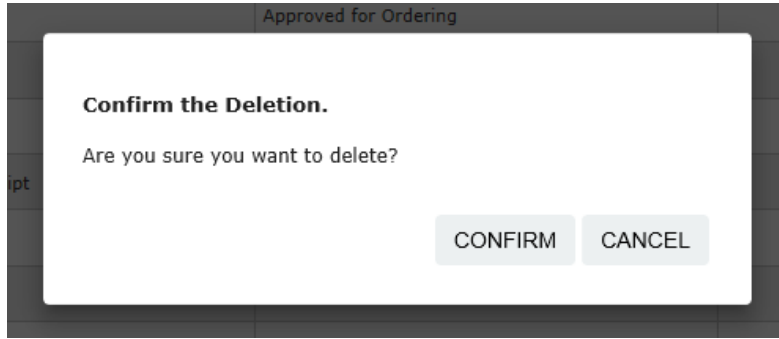
The Setup Cage Types page opens.

My Workspaces ▼ Vivarium **Setup Cage Types** Back

Add a New Cage Type Delete Cage Type(s)

<input type="checkbox"/>	Edit	Cage Type	Species	Size(Floor Space)	Max. Animals Per Cage	Per Diem by	Is Default for Selected Species
<input type="checkbox"/>		Crow Medium Cage	American crow	10.00	10	Cage	Yes
<input type="checkbox"/>		Bird Cage	Bird	5.00	5	Cage	Yes
<input type="checkbox"/>		Canine	Canine	20.00	3	Cage	Yes
<input type="checkbox"/>		Canine small	Canine	10.00	2	Cage	No
<input type="checkbox"/>		Drosophila Standard	Drosophila	1.00	200	Cage	Yes
<input type="checkbox"/>		Large Goat cage	Goat	1.00	1	Cage	Yes
<input type="checkbox"/>		Large Mouse Cage	Mouse	100.00	25	Cage	Yes
<input type="checkbox"/>		Type A (Small)	Mouse	2.00	2	Cage	No
<input type="checkbox"/>		Large Pig Cage	Pig	200.00	7	Cage	No
<input type="checkbox"/>		Small Pig Cage	Pig	50.00	2	Cage	Yes

Select the checkbox(es) to the left of the **Cage Type(s)** to be deleted and click the **Delete Cage Type(s)** button. A confirmation popup window displays.

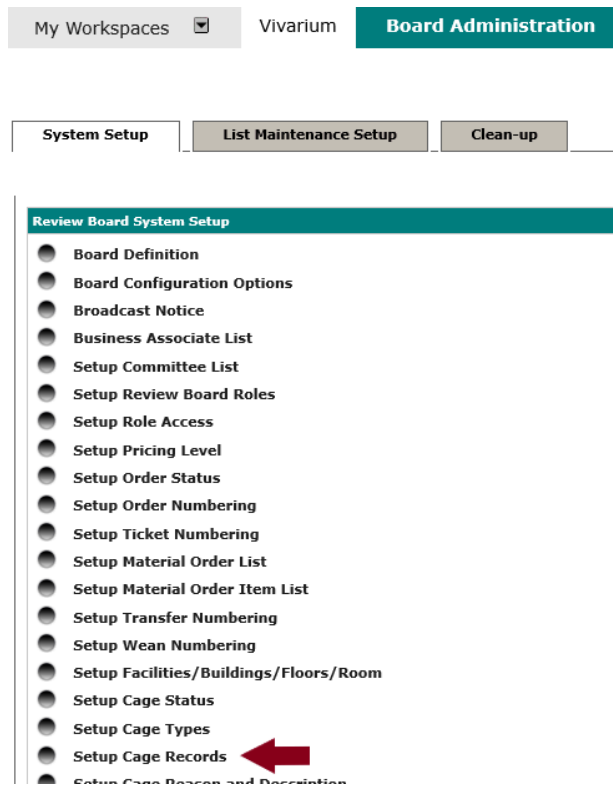


Click **CONFIRM** to delete the record(s) and return to the **Setup Cage Types** page. Click **CANCEL** to return to the **Setup Cage Types** page without deleting the record.

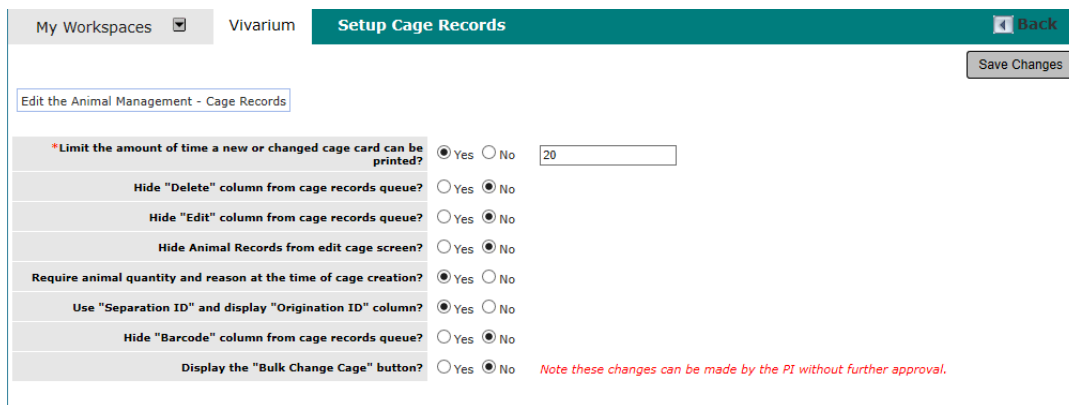
### Setup Cage Records

In the iRIS™ system a user in the role of Primary Investigator (PI) is allowed to set certain controls that dictate visibility and validation rules for cage records. However, the institution may wish to set some or all of those controls at the system level and keep them locked.

The **Setup Cage Records** page is where the system administrator sets cage record controls at the system level. To begin, navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Cage Records** link.



The **Edit the Animal Management – Cage Records** panel opens in the **Setup Cage Records** page, with fields unlocked for editing.



My Workspaces ▼ Vivarium **Setup Cage Records** ← Back

Save Changes

Edit the Animal Management - Cage Records

\*Limit the amount of time a new or changed cage card can be printed?  Yes  No

Hide "Delete" column from cage records queue?  Yes  No

Hide "Edit" column from cage records queue?  Yes  No

Hide Animal Records from edit cage screen?  Yes  No

Require animal quantity and reason at the time of cage creation?  Yes  No

Use "Separation ID" and display "Origination ID" column?  Yes  No

Hide "Barcode" column from cage records queue?  Yes  No

Display the "Bulk Change Cage" button?  Yes  No *Note these changes can be made by the PI without further approval.*

Options set here propagate to all iRIS™ system areas where the referenced items (e.g., cage record “Edit” and “Delete” columns, animal quantity and reason data fields, etc.) are accessible for viewing, editing or printing. Specific examples of related screen impacts are shown in the Impacts on Related Screens section of this manual, immediately following.

To limit the number of times a cage card for a given cage record can be printed *by all iRIS™ users across the system*, set the **Limit the amount of time a new or changed cage card can be printed?** flag to “Yes” and specify the maximum number of printed cards in the text field to the right of the flag.

*Note: Again, the limit set here is applicable to ALL iRIS™ users across the installed system, and its corresponding counter is incremented by one each time a cage card is printed by any iRIS™ user.*

Set the **Hide "Delete" column from cage records queue?** flag to “Yes” to hide the Delete column for cage records on pages where the cage records queue appears.

Set the **Hide "Edit" column from cage records queue?** flag to “Yes” to hide the Edit column for cage records on pages where the cage records queue appears.

Set the **Hide Animal Records from edit cage screen?** to “Yes” to hide fields related to animal subjects on pages where the cage records queue appears and on pages where cage records are edited.

Set the **Require animal quantity and reason at the time of cage creation?** flag to “Yes” to make animal quantity and reason for the cage requisition required fields.

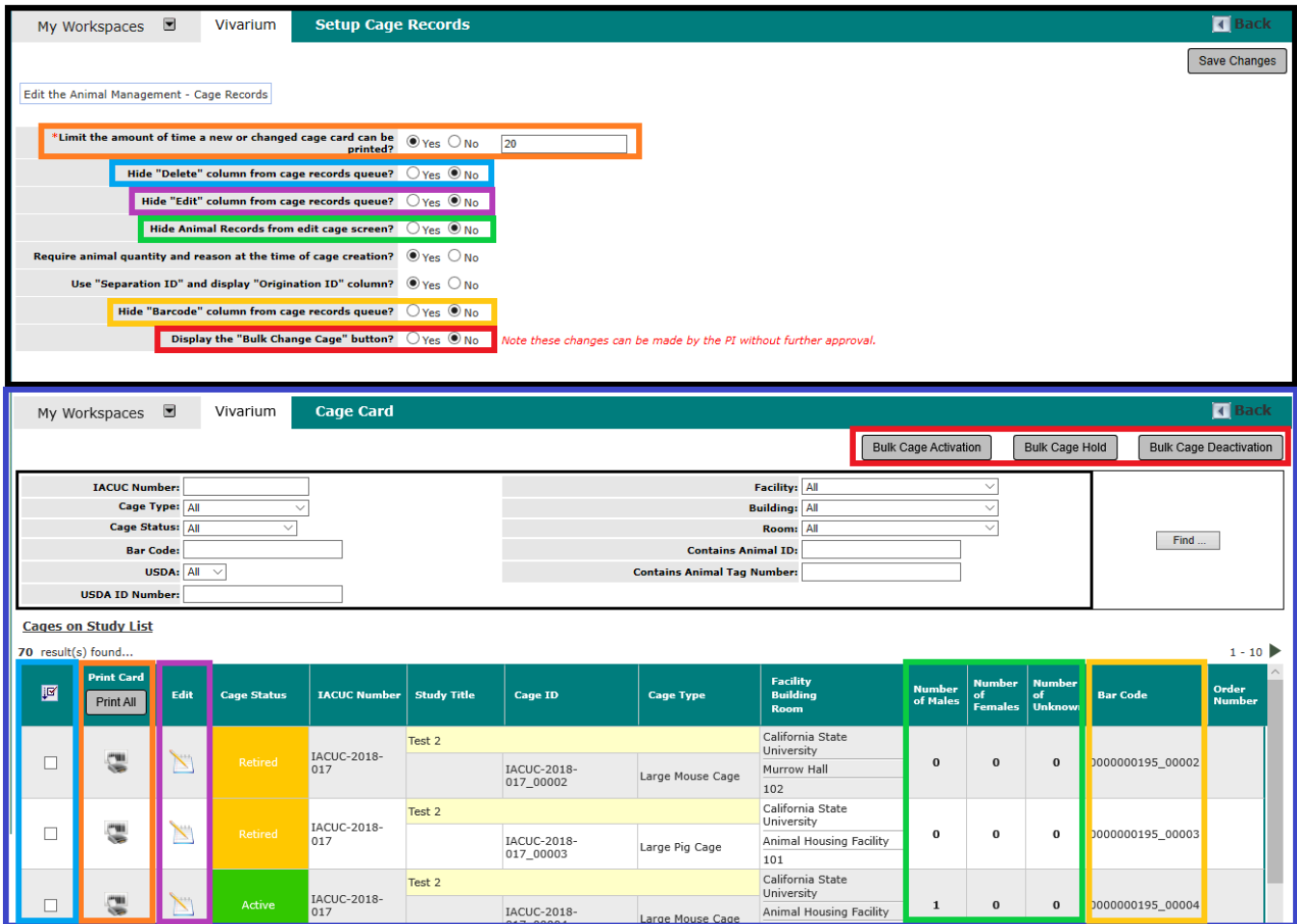
Set the **Use "Separation ID" and display "Origination ID" column?** flag to “Yes” to indicate separation numbering is in use for animal subjects and display the Origination ID column on pages where animal subject records appear.

Set the **Hide "Barcode" column from cage records queue?** flag to “Yes” to hide the Barcode column for cage records on pages where the cage records queue appears.

Set the **Display the "Bulk Change Cage" button?** flag to "Yes" to include bulk change operation buttons (Bulk Cage Activation, Bulk Cage Hold, Bulk Cage Deactivation) on pages where the cage records queue appears.

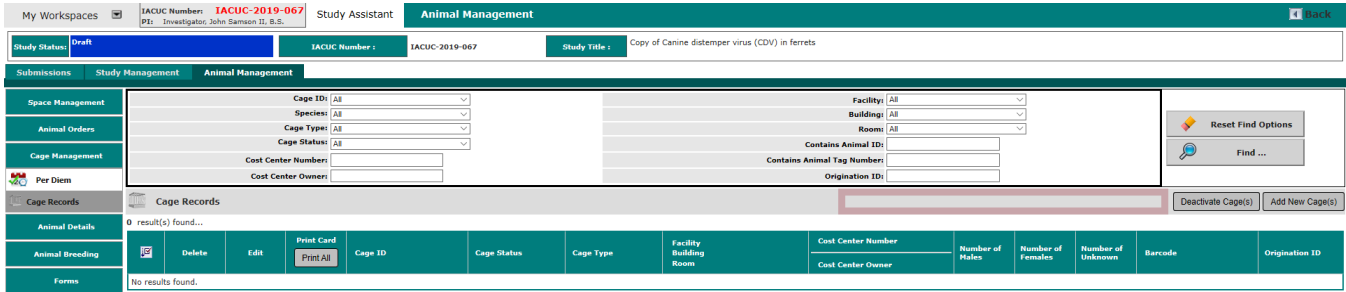
### Impacts on Related Screens

The primary page for cage card actions is the **Cage Card** page, which is accessed via the Cage Cards link in the main ARC menu or via the Cage Cards icon in the main ARC workspace. In the image below, colored boxes are used to map the data fields in the **Setup Cage Records** page at top (black border) with the impacted areas in the **Cage Card** page at bottom (royal blue border).

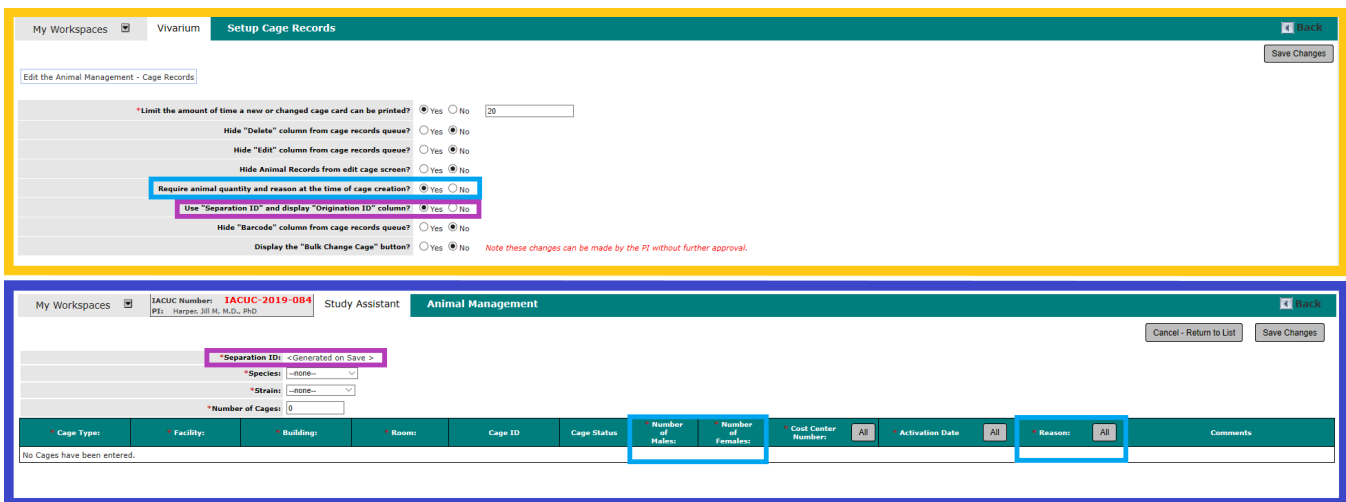


Impacts of **Setup Cage Records** settings are also seen on the **Animal Management** page, accessed via Study Assistant > Find A Study > [animal subject study open for editing] > [Animal Management tab].

In the image below, a semi-transparent box demonstrates where bulk action buttons appear when the **Display the "Bulk Change Cage" button?** flag on the **Setup Cage Records** page is set to "Yes".



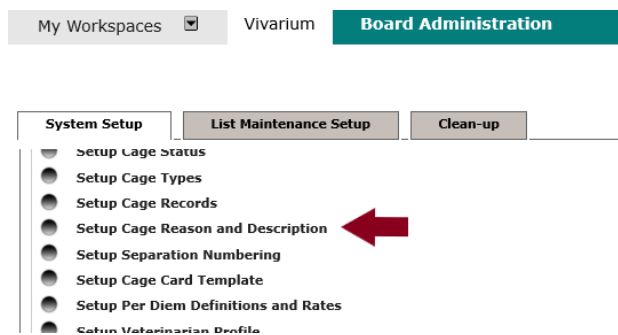
In the image below, colored boxes are used to map the data fields in the **Setup Cage Records** page at top (yellow border) with the impacted areas in the Add New Cage(s) panel of the **Animal Management** page at bottom (royal blue border).





Note that these examples are not the only system pages that include **Setup Cage Records** items.

## Setup Cage Reason and Description

The iRIS™ system allows for tracking animal subject cage requisitions by the reason the cage is needed and details of intended use. To begin, navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Cage Reason and Description** link.



The Setup Cage Reason and Description page opens.


My Workspaces ▾		Vivarium		Setup Cage Reason and Description <span>⏪ Back</span>	
		Add a New Cage Reason		Delete Cage Reason	
	Edit	Reason	Description	Deduct from Authorized Quantity?	
<input type="checkbox"/>		Study	Cage to be used for study animal subjects.	No	

### Edit Cage Reason and Description



Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Cage Reason and Description** link.

My Workspaces ▾ Vivarium **Board Administration**

System Setup | List Maintenance Setup | Clean-up

- Setup Cage Status
- Setup Cage Types
- Setup Cage Records
- Setup Cage Reason and Description 
- Setup Separation Numbering
- Setup Cage Card Template
- Setup Per Diem Definitions and Rates
- Setup Veterinarian Profile

The Setup Cage Reason and Description page opens.

My Workspaces ▾		Vivarium		Setup Cage Reason and Description <span>⏪ Back</span>	
		Add a New Cage Reason		Delete Cage Reason	
	Edit	Reason	Description	Deduct from Authorized Quantity?	
<input type="checkbox"/>		Study	Cage to be used for study animal subjects.	No	

Click the icon in the **Edit** column for the applicable record. The record is opened in a panel with editable fields.

My Workspaces ▾ Vivarium **Setup Cage Reason and Description** ⏪ Back Save Reason

\*Reason:

\*Description:   
(1000 characters maximum)

Deduct from Authorized Quantity?  Yes  No

The **Reason** field is used to enter the reason a cage is being requisitioned. Typical **Reason** entries might be “Study”, “Breeding” or “Treatment”. It is up to the institution to determine its preferred naming convention for **Reason**.

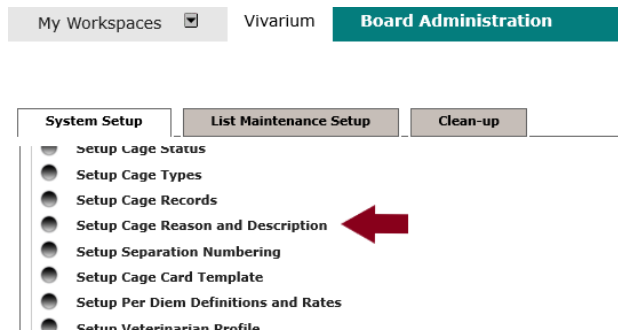
The **Description** field is used to provide further details of the stated reason.

The **Deduct from Authorized Quantity?** flag is set to “No” by default. Set this flag to “Yes” to automatically deduct a cage requisitioned for the specified **Reason** from the total number of cages authorized for a study.

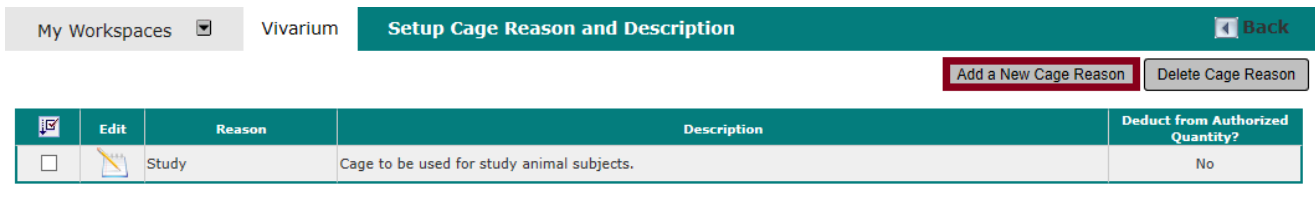
Make desired changes and click the **Save Reason** button to save changes and return to the **Setup Cage Reason and Description** list page.

### Add Cage Reason and Description

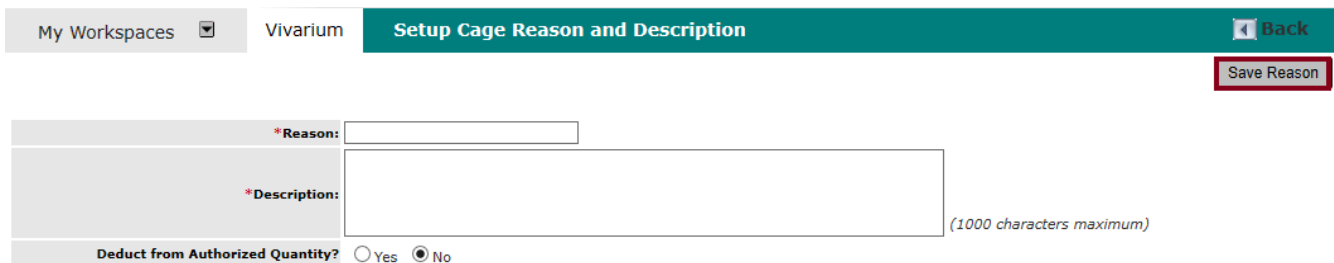
Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Cage Reason and Description** link.



The **Setup Cage Reason and Description** page opens.



Click the **Add a New Cage Reason** button. A panel with editable fields opens for creation of the new record.



The **Reason** field is used to enter the reason a cage is being requisitioned. Typical **Reason** entries might be “Study”, “Breeding” or “Treatment”. It is up to the institution to determine its preferred naming convention for **Reason**.

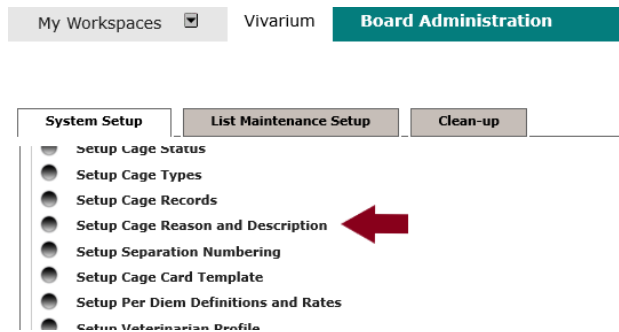
The **Description** field is used to provide further details of the stated reason.

The **Deduct from Authorized Quantity?** flag is set to “No” by default. Set this flag to “Yes” to automatically deduct a cage requisitioned for the specified **Reason** from the total number of cages authorized for a study.

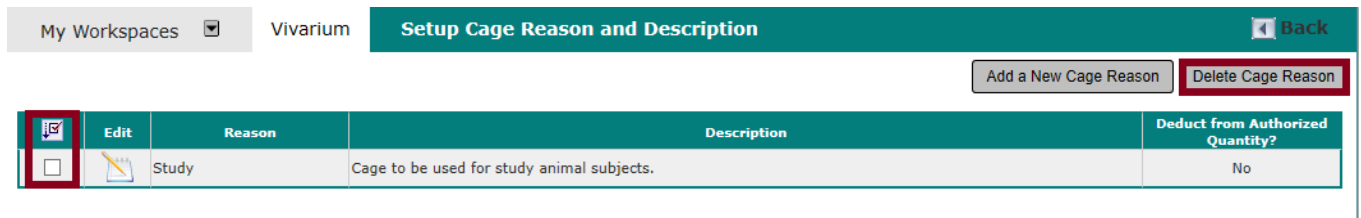
Make desired entries and click the **Save Reason** button to save the new record and return to the **Setup Cage Reason and Description** list page.

### Delete Cage Reason and Description

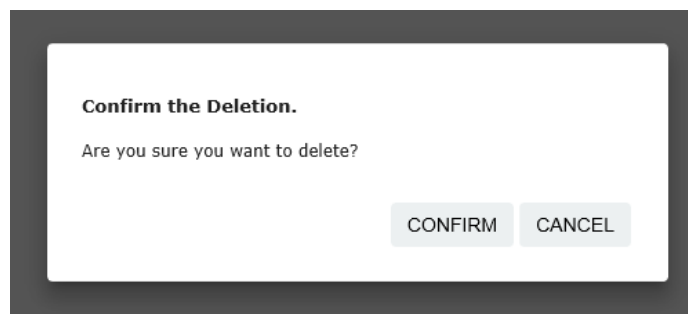
Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Cage Reason and Description** link.



The **Setup Cage Reason and Description** page opens.



Select the checkbox at far left for the record to be deleted and click the **Delete Cage Reason** column for the applicable record. A confirmation popup window displays.

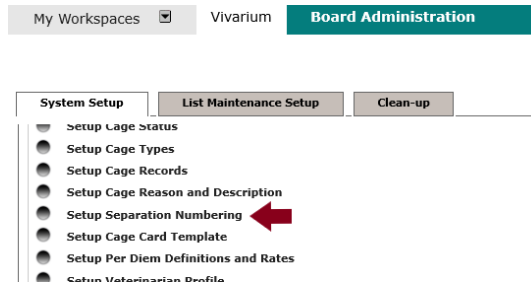


Click **CONFIRM** to delete the record(s) and return to the **Setup Cage Reason and Description** list page. Click **CANCEL** to return to the **Setup Cage Reason and Description** list page without deleting the record.

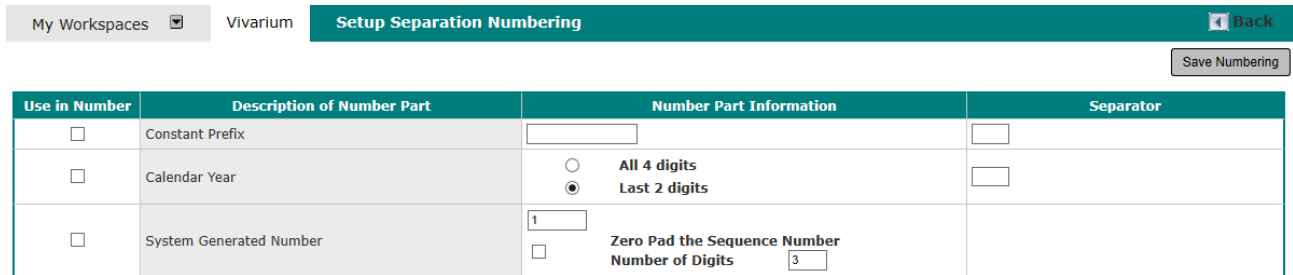
## Setup Separation Numbering

Separation numbering is required when animal subjects in a cage that already has a tracking number assigned are separated into two or more cages. Assigning a separation tracking number ensures an electronic paper trail of cage and animal subject history is preserved.

To configure separation numbering, click the **Setup Separation Numbering** link under ARC > Review Board Administration > [System Setup tab].



The **Setup Separation Numbering** page opens.



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

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 separation numbering scheme that employs all available options has been entered.

My Workspaces Vivarium **Setup Separation Numbering** Back

**Save Numbering**

Use in Number	Description of Number Part	Number Part Information	Separator
<input checked="" type="checkbox"/>	Constant Prefix	SEP	-
<input checked="" type="checkbox"/>	Calendar Year	<input type="radio"/> All 4 digits <input checked="" type="radio"/> Last 2 digits	/
<input checked="" type="checkbox"/>	System Generated Number	1 <input checked="" type="checkbox"/> Zero Pad the Sequence Number Number of Digits: 4	

The **Constant Prefix** is “SEP”.

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

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

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

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

The first separation number generated by this scheme would be:

SEP-19/0001

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

## Setup Cage Card Template

iRIS™ includes tools for creation of customized, optionally barcoded, animal subject cage cards.

In addition to boilerplate text and barcodes, system Merge Codes can be added to cage card templates to include identifying details, order details, and other data relevant to the animal subject.

## Edit Cage Card Template

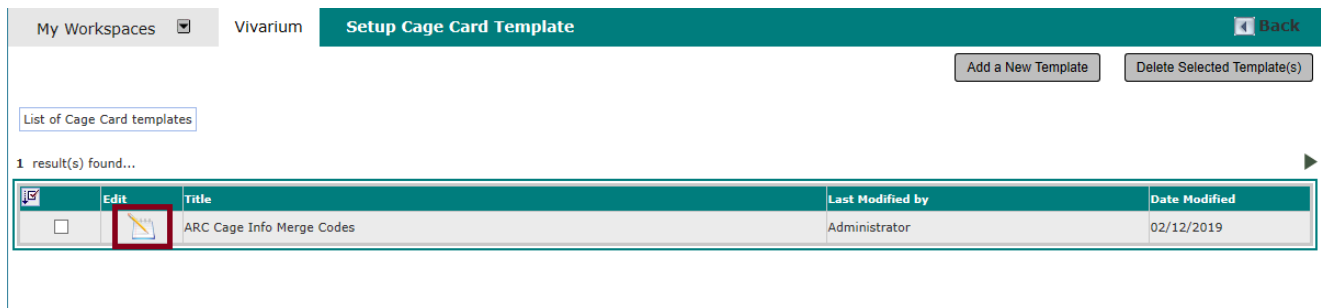
Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Cage Card Template** link.

My Workspaces Vivarium **Board Administration**

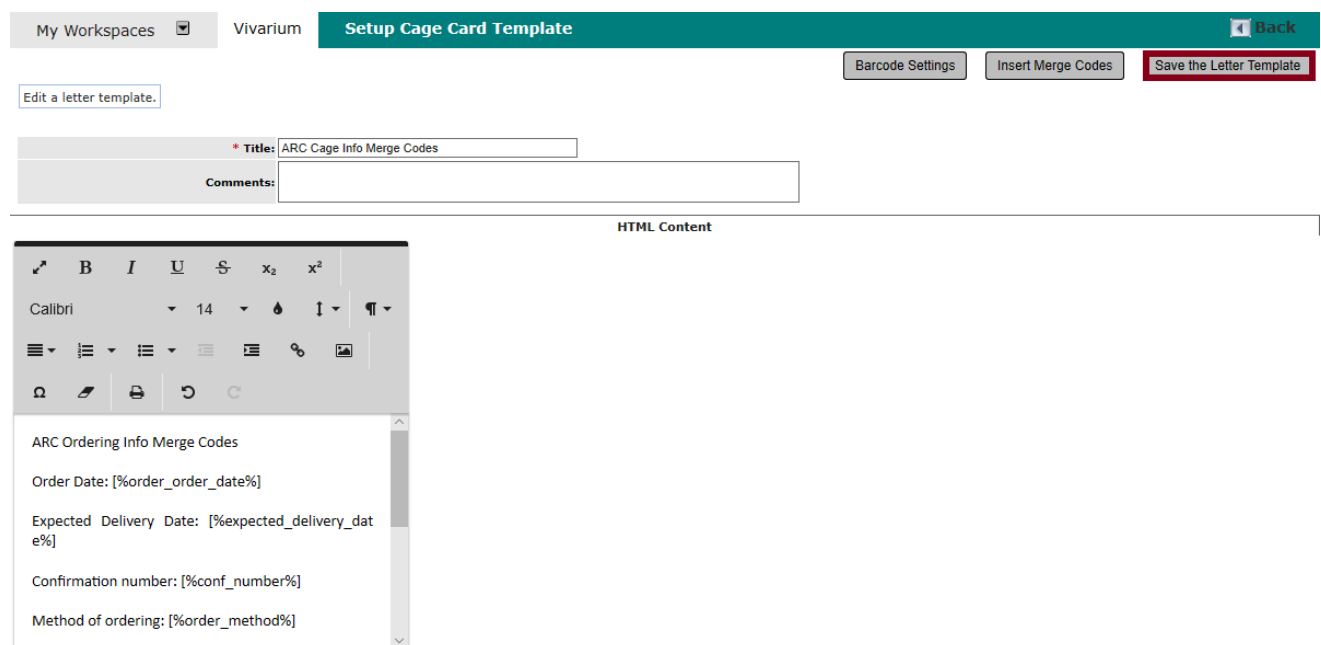
System Setup  
  List Maintenance Setup  
  Clean-up

- Setup Cage Status
- Setup Cage Types
- Setup Cage Records
- Setup Cage Reason and Description
- Setup Separation Numbering
- Setup Cage Card Template
- Setup Per Diem Definitions and Rates
- Setup Veterinarian Profile

The **Setup Cage Card Template** page opens.



Click the icon in the **Edit** column for the record to be edited. The **Edit a letter template** panel opens, with editable fields.



The **Title** field contains the name of the cage card template.

The **Comments** field is where more information about the template can be entered.

The **HTML Content** section contains a text editor panel with standard text editing and formatting tools. This is where the system administrator enters text and Merge Codes to populate the printed cage card.

Merge Codes are used to pull data from iRIS™ records into documents, templates, forms and system webpages. For example, to include the vendor name on a printed cage card the system administrator would insert the Merge Code for vendor name in the cage card template where the vendor name should appear.

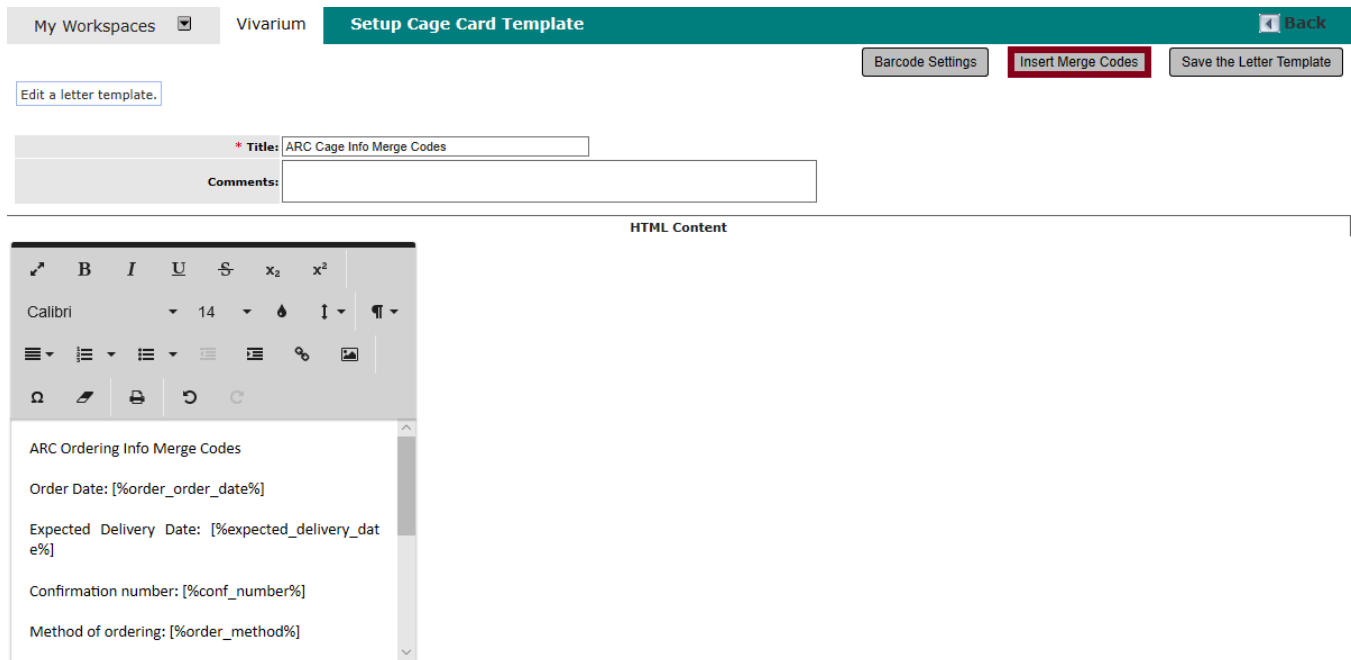
Merge Codes are selected from a picklist, the system administrator does not need to write or edit any programmatic code to use Merge Codes. This process is covered in more detail in the Insert Merge Codes section of this manual, immediately after this section.

Make desired edits and click the **Save the Letter Template** button to save the template.

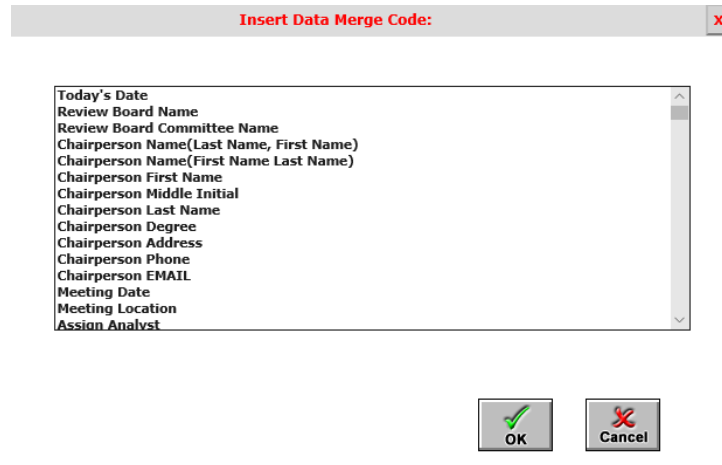
### Insert Merge Codes

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

Note that the Merge Code only contains a data value. Desired titles, labels and informational text to be printed on the cage card must be manually entered (typed or copied and pasted) in the template text editor panel. For example, in the screenshot below “ARC Ordering Info Merge Codes” is a manually entered title and “Order Date:” is a manually entered label. The Merge Code entry of “ [%order\_order\_date%] “ was inserted by the system when the item “Order - Order Date “ was selected from the Merge Codes picklist.



To add a Merge Code to the template, click to place the cursor inside the text editor panel where the Merge Code is to be inserted and click the **Insert Merge Codes** button. The **Insert Data Merge Code** popup window opens. The window contains a scrollable list of iRIS™ data items that can be added to the cage card template.



Scroll to the desired item and click to select it, then click the **OK** button to insert the selected item in the template.

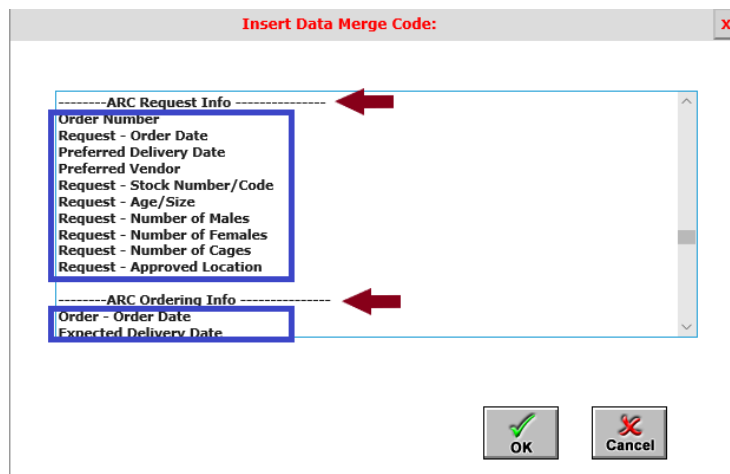
Click the **Cancel** button to close the popup without inserting a Merge Code.

**Merge Code List**

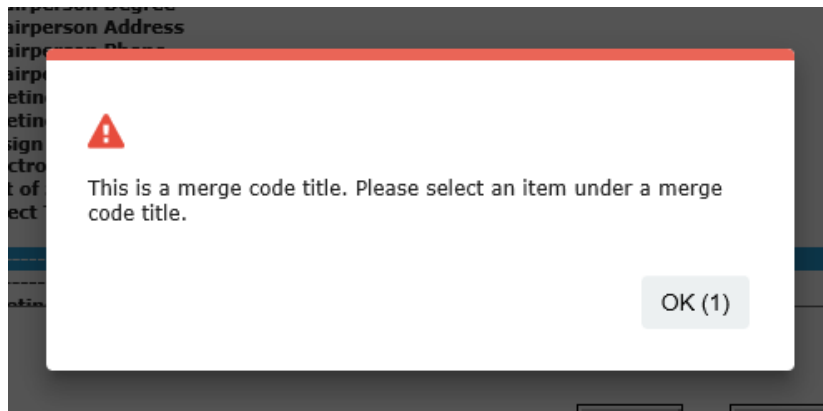
Depending on the user’s data access rights and the institution’s Review Board Administration settings, the Merge Code list can include system data from the following categories:

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 the cage card template. If a title item is selected and the **OK** button is clicked, an error popup window displays.



**Merge Codes Applicable to ARC**

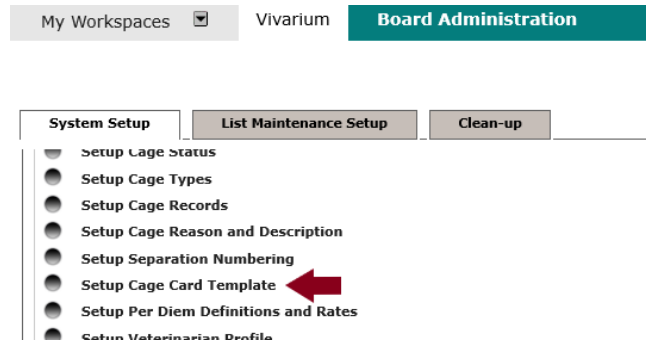
Categories and Merge Codes from the list that are most applicable to ARC cage card templates are summarized in the table below.

---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		

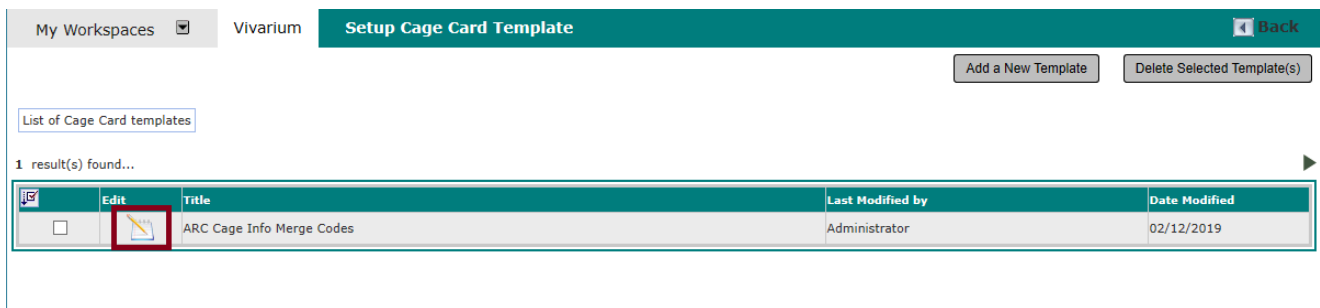
### Cage Card Barcode Placement

Cage cards can include barcodes for scanning into ordering, invoicing and inventory management systems. Where barcodes are in use, they can be positioned where desired in the cage card template.

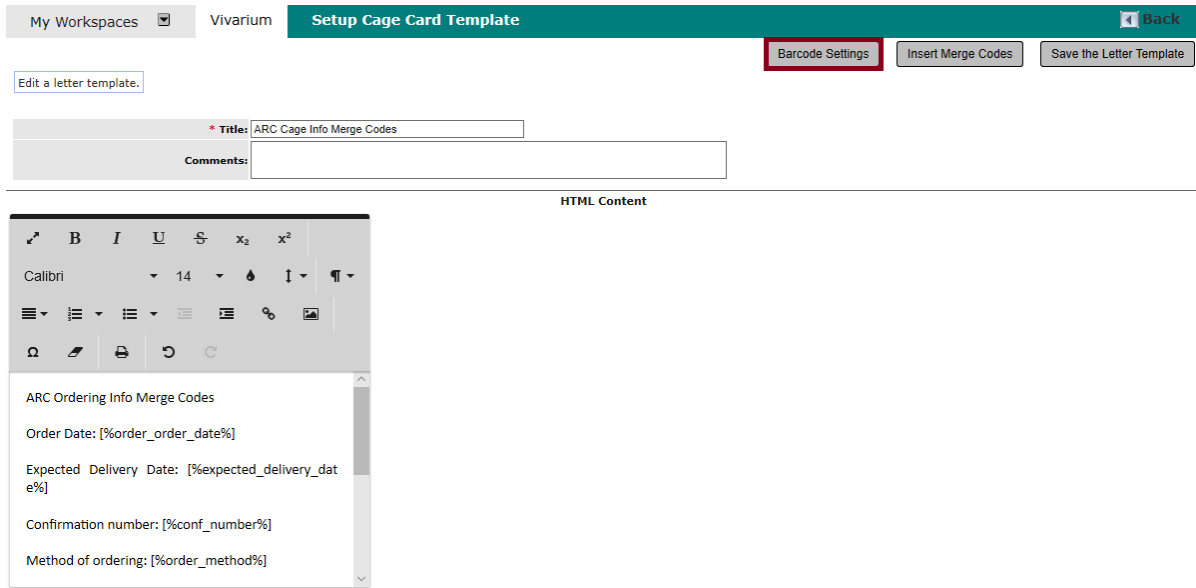
Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Cage Card Template** link.



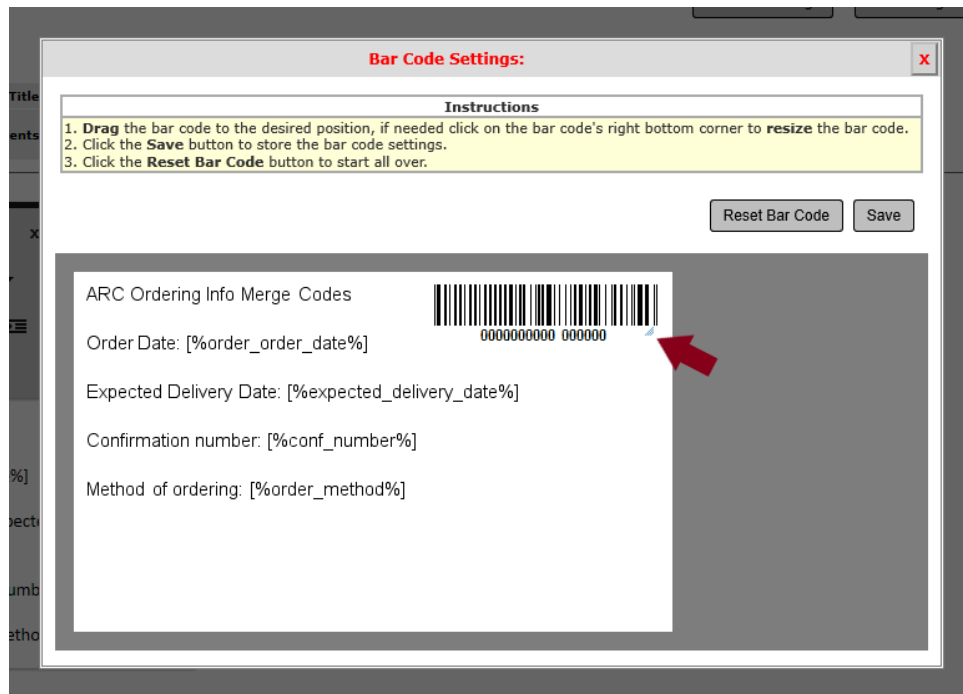
The **Setup Cage Card Template** page opens.



Click the icon in the **Edit** column for the record to be edited. The **Edit a letter template** panel opens, with editable fields.



Click the **Barcode Settings** button. The **Bar Code Settings** popup window opens.

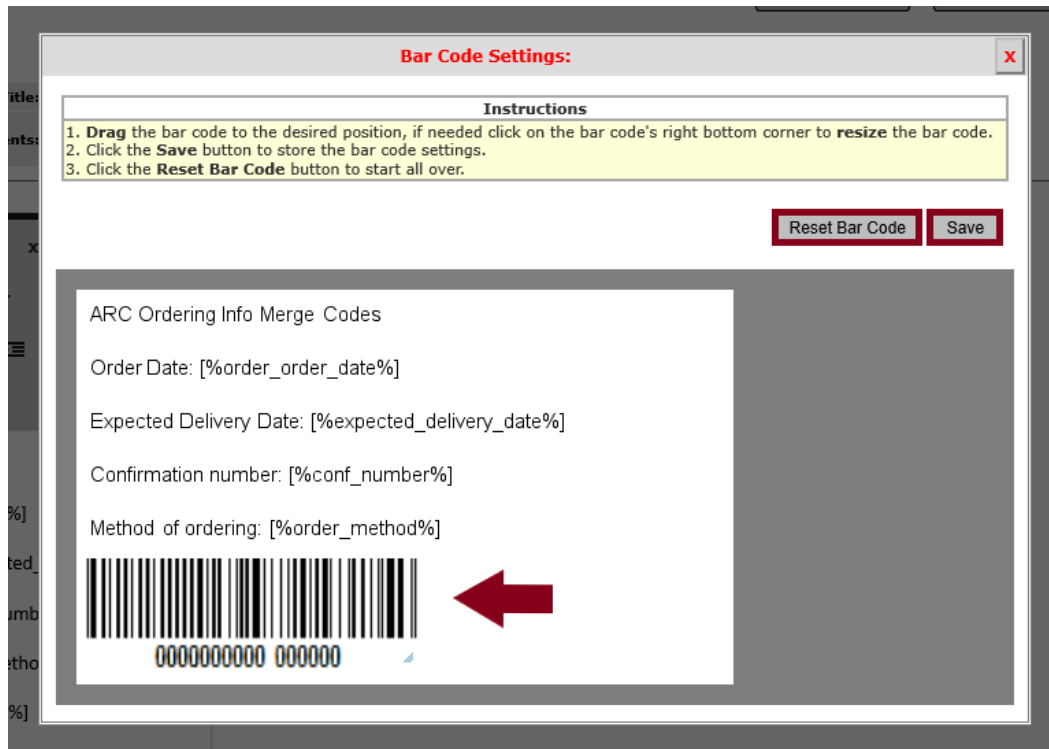


Note the directions at top.

To move the barcode to a different location, click on it and hold, then drag it to the desired location on the card.

To resize the barcode, click on the resizing handle at the lower right corner of the barcode (indicated by a red arrow in the screenshot above) and drag to enlarge or shrink it.

In the example shown below the barcode has been enlarged and dragged to the bottom of the card template.



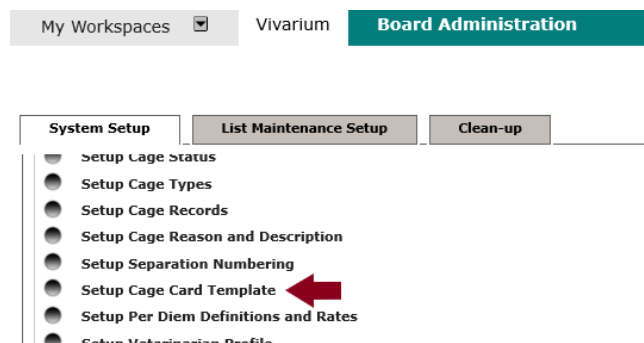
Click the close icon (red X ) at the upper right corner of the popup window to close it without saving changes.

Click the **Reset Bar Code** button to reset the barcode to its original location and size.

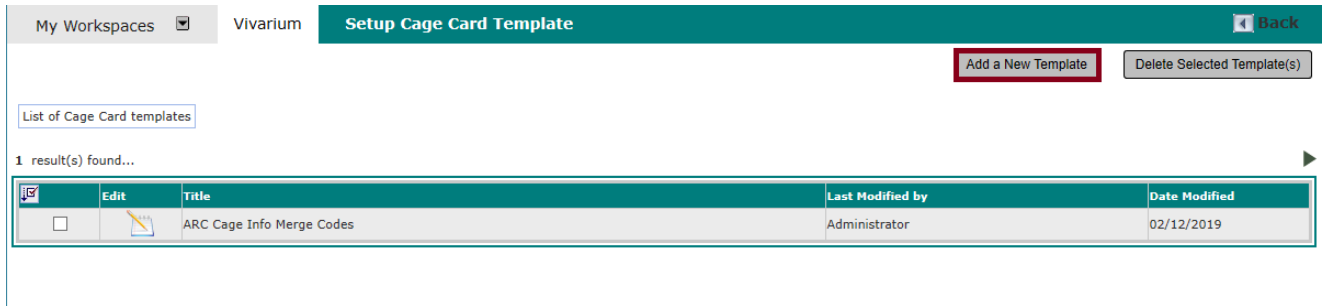
Click the **Save** button to save changes and close the popup window.

### Add Cage Card Template

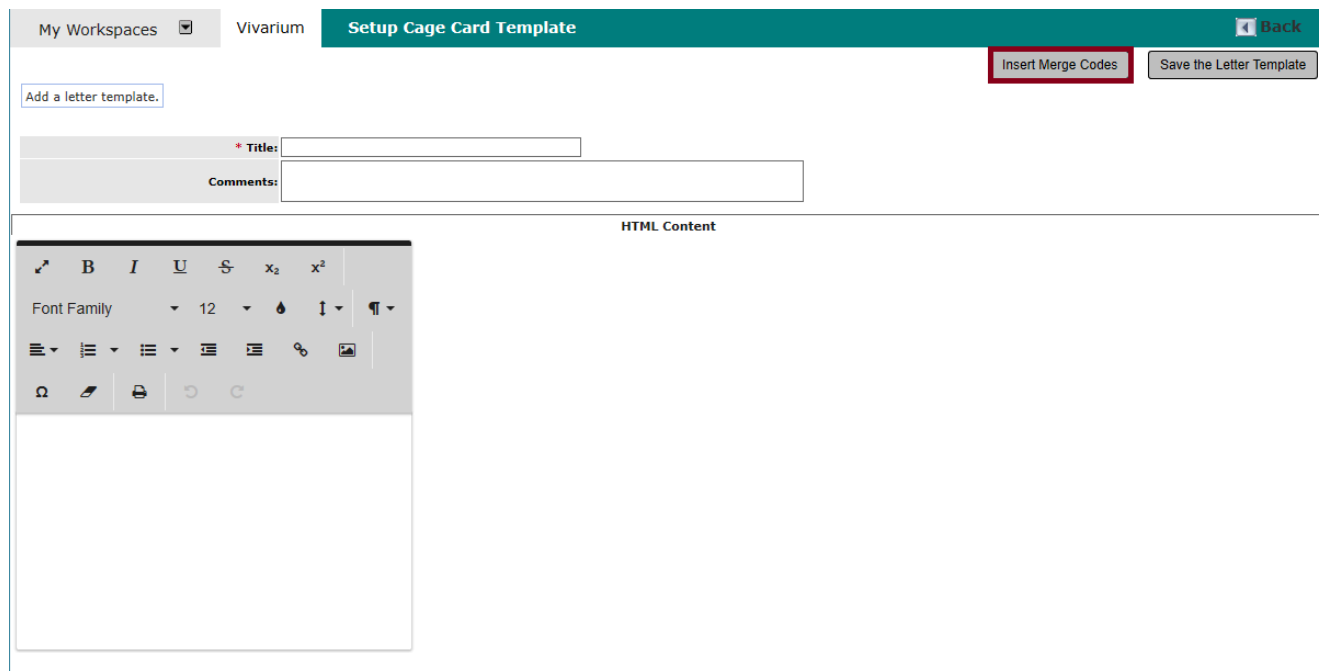
Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Cage Card Template** link.



The **Setup Cage Card Template** page opens.



Click the **Add a New Template** button. The **Add a letter template** panel opens.



The **Title** field is used to name the cage card template.

The **Comments** field is used to enter more information about the template.

The **HTML Content** section contains a text editor panel with standard text editing and formatting tools. This is where the system administrator enters text and Merge Codes to populate the printed cage card.

The **Insert Merge Codes** button is used to insert Merge Codes in the text editor.

Merge Codes are used to pull data from iRIS™ records into documents, templates, forms and system webpages. For example, to include the vendor name in a cage card when it's printed, the system administrator would insert the Merge Code for vendor name in the cage card template where the email address should appear. This process is covered in more detail in the Insert Merge Codes section of this manual, within the Edit Cage Card Template section.

Make desired entries and selections in the panel. In the example below, a template has been created with boldface formatted text and inserted Merge Codes.

The screenshot shows the 'Setup Cage Card Template' page. At the top, there are navigation elements: 'My Workspaces' with a dropdown arrow, 'Vivarium', and the page title 'Setup Cage Card Template' with a 'Back' button. On the right side, there are two buttons: 'Insert Merge Codes' and 'Save the Letter Template', with the latter highlighted in red. Below the navigation is a text input field containing 'Add a letter template.'. The main form area has a 'Title' field with the value 'Animal Subject Info Cage Card' and a 'Comments' field with the text 'Cage card template to include only barcode and details of animal subjects.'. Below the form is a rich text editor toolbar with options for bold, italic, underline, strikethrough, subscript, and superscript. The editor content shows the following text: **ANIMAL SUBJECT INFORMATION**, **Species:** [%order\_species%], **Strain:** [%order\_strain%], **Age/Size:** [%order\_age\_size%], **Number of Males:** [%order\_num\_males%], and **Number of Females:** [%order\_num\_females%].

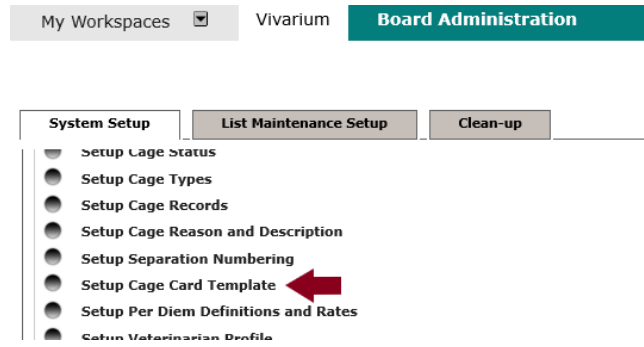
Click the **Save the Letter Template** button to save the template. The add panel closes and as shown below, the template is added to the list on the main **Setup Cage Card Template** page.

The screenshot shows the 'Setup Cage Card Template' page after saving. The 'Save the Letter Template' button is no longer visible. Instead, there are 'Add a New Template' and 'Delete Selected Template(s)' buttons. Below these is a search input field with 'List of Cage Card templates'. The results section shows '2 result(s) found...'. A table lists the saved templates:

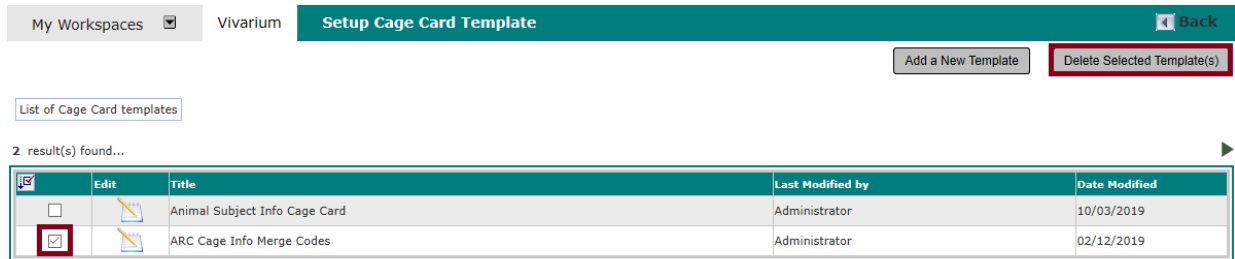
<input checked="" type="checkbox"/>	Edit	Title	Last Modified by	Date Modified
<input type="checkbox"/>		Animal Subject Info Cage Card	Administrator	10/03/2019
<input type="checkbox"/>		ARC Cage Info Merge Codes	Administrator	02/12/2019

## Delete Cage Card Template

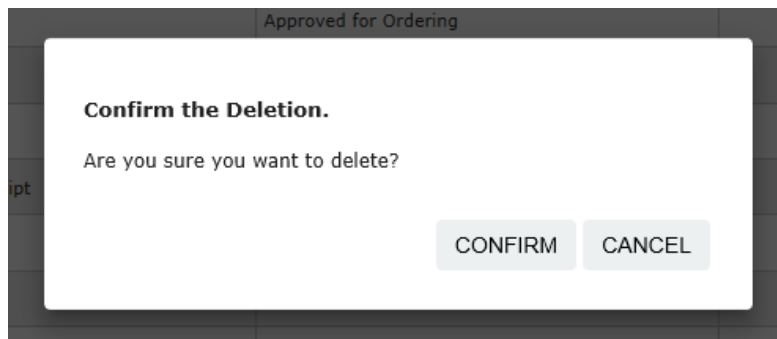
Navigate to ARC > Review Board Administration **System Setup** tab and click the **Setup Cage Card Template** link.



The **Setup Cage Card Template** page opens.



Select the checkbox(es) in the **Delete** column for the record(s) to be deleted and click the **Delete Selected Template(s)** button. A confirmation popup window displays.



Click **CONFIRM** to delete the cage card template(s) and return to the **Setup Cage Card Template** page. Click **CANCEL** to return to the **Setup Cage Card Template** page without deleting the record.