Animal Resource Center

List Maintenance

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Contents

Introduction....1
Navigation in iRIS™....2
Path Directory Tree....2
Back Button....3
Animal Species Configuration List....4
USDA Pain and Distress Categories....4
Species List Implementation – Application Side....5
Species List Implementation – Board Side....11
Add Species....15
Edit Species....20
Delete Species....23
Merge Species....24
Animal Species Category Configuration List....27
Species Category Implementation – Application Side....28
Species Category Implementation – Board Side....29
Add Species Category....29
Edit Species Category....30
Delete Species Category....31
Animal Species Sex Configuration List....33
Animal Species Sex List Implementation – Application Side....33
Animal Species Sex List Implementation – Board Side....34
Add Species Sex....34
Edit Species Sex....35
Delete Species Sex....36
Animal Expense Category Configuration List....38
Animal Expense Category Implementation – Application Side....38
Animal Expense Category Implementation – Board Side....38
Add Animal Expense Category....39
Edit Animal Expense Category....40
Delete Animal Expense Category....41
Animal Transaction Type Configuration List....43

Animal Transaction Type Implementation – Application Side..... 44
Animal Transaction Type Implementation – Board Side..... 44
Add Animal Transaction Type..... 44
Edit Animal Transaction Type..... 45
Delete Animal Transaction Type..... 46
Animal Procedure & Service Configuration List..... 47
Animal Procedure & Service Implementation – Application Side..... 48
Animal Procedure & Service Implementation – Board Side..... 49
Add Animal Procedure or Service..... 49
Download Animal Procedure or Service Template..... 51
Upload Animal Procedure or Service Template..... 53
Edit Animal Procedure or Service..... 54
Delete Animal Procedure or Service..... 56
Merge Animal Procedure or Service..... 57
Animal Protocol / Study Type Configuration List..... 59
Animal Protocol / Study Type Implementation – Application Side..... 60
Animal Protocol / Study Type Implementation – Board Side..... 60
Add Animal Protocol / Study Type..... 60
Edit Animal Protocol / Study Type..... 62
Delete Animal Protocol / Study Type..... 63
Animal Document Categories Configuration List..... 65
Add Animal Document Category..... 65
Edit Animal Document Category..... 66
Delete Animal Document Category..... 67
Anesthetic Configuration List..... 68
Anesthetic List Implementation – Application Side..... 69
Anesthetic List Implementation – Board Side..... 69
Add Anesthetic..... 69
Edit Anesthetic..... 72
Delete Anesthetic..... 73
Merge Anesthetic Records..... 74
Analgesia Configuration List..... 76

Analgesia List Implementation – Application Side....76
Analgesia List Implementation – Board Side.... 77
Add Analgesia.... 77
Edit Analgesia.... 79
Delete Analgesia....81
Merge Analgesia Records.... 81
Device Configuration List....83
Device List Implementation – Application Side.... 84
Device List Implementation – Board Side....84
Add a New Device....85
Download Device Configuration Template.... 86
Upload Device Configuration Template.... 87
Edit Device....88
Delete Device....89
Merge Device Records....90
Restraint Device Configuration List....92
Restraint Device List Implementation – Application Side....93
Restraint Device List Implementation – Board Side....93
Add a New Restraint Device.... 93
Edit Restraint Device....95
Delete Restraint Device.... 96
Merge Restraint Device Records....97
Drug Configuration List....99
Drug List Implementation – Application Side.... 100
Drug List Implementation – Board Side....100
Add a New Drug....100
Download Drug Configuration Template.... 101
Upload Drug Configuration Template.... 103
Edit Drug....103
Delete Drug....105
Merge Drug Records....106
Euthanasia Method Configuration List.... 108

Euthanasia List Implementation – Application Side..... 109
Euthanasia List Implementation – Board Side..... 109
Add Euthanasia Method..... 109
Edit Euthanasia Method..... 111
Delete Euthanasia Method..... 113
Merge Euthanasia Method Records..... 114
Fluid Extract Configuration List..... 116
Fluid Extract List Implementation – Application Side..... 117
Fluid Extract List Implementation – Board Side..... 118
Add Fluid Extract..... 118
Edit Fluid Extract..... 120
Delete Fluid Extract..... 122
Merge Fluid Extracts..... 123
Internal Document Category..... 125
Internal Document List Implementation – Application Side..... 126
Internal Document List Implementation – Board Side..... 128
Add Internal Document Category..... 128
Edit Internal Document Category..... 130
Delete Internal Document Category..... 131
Internal Routing User Roles..... 132
Internal Routing User Role List Implementation – Application Side..... 132
Internal Routing User Role List Implementation – Board Side..... 134
Add Internal Routing User Role..... 134
Edit Internal Routing User Role..... 135
Delete Internal Routing User Role..... 137
Paralyzing Agent Configuration List..... 138
Paralyzing Agent List Implementation – Application Side..... 138
Paralyzing Agent List Implementation – Board Side..... 138
Add Paralyzing Agent..... 138
Edit Paralyzing Agent..... 141
Delete Paralyzing Agent..... 142
Predefined Stipulations..... 143

Predefined Stipulation List Implementation – Application Side..... 144
Predefined Stipulation List Implementation – Board Side..... 144
Add Predefined Stipulation..... 144
Edit Predefined Stipulation..... 146
Delete Predefined Stipulation..... 148
Review Outcome/Outcome Configuration List..... 149
Review Outcome List Implementation – Application Side..... 150
Review Outcome List Implementation – Board Side..... 150
Add Review Outcome..... 150
Edit Review Outcome..... 152
Delete Review Outcome..... 154
Reviewer Rank Configuration List..... 155
Reviewer Rank List Implementation – Application Side..... 156
Reviewer Rank List Implementation – Board Side..... 156
Add Reviewer Rank..... 157
Edit Reviewer Rank..... 159
Delete Reviewer Rank..... 160
Setup Review Board Stipulation Actions..... 162
Add Review Board Stipulation..... 162
Edit Review Board Stipulation..... 164
Delete Review Board Stipulation..... 165
Study Document Outcome/Outcome Configuration List..... 167
Study Document Outcome List Implementation – Application Side..... 167
Study Document Outcome List Implementation – Board Side..... 167
Add Study Document Outcome..... 168
Edit Study Document Outcome..... 171
Delete Study Document Outcome..... 173
Substance Configuration List..... 174
Substance List Implementation – Application Side..... 175
Substance List Implementation – Board Side..... 175
Add Substance..... 175
Edit Substance..... 177

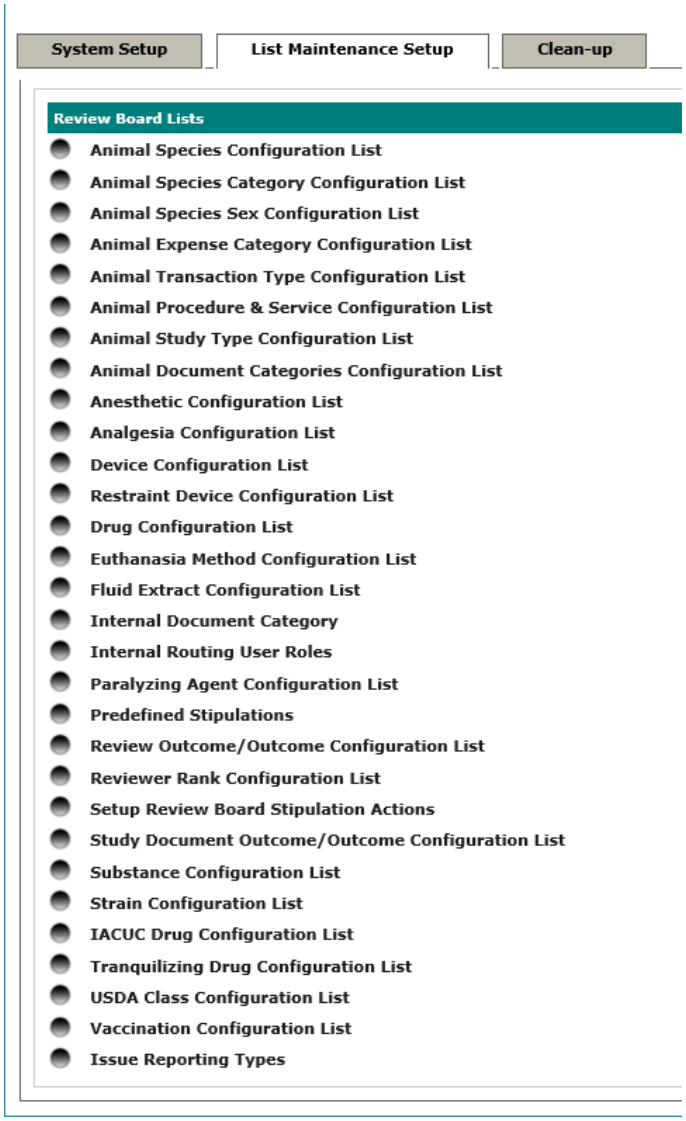
Delete Substance....179
Strain Configuration List....180
Strain List Implementation – Application Side....181
Strain List Implementation – Board Side....184
Add Strain....184
Edit Strain....185
Delete Strain....187
IACUC Drug Configuration List....188
IACUC Drug List Implementation – Application Side....189
IACUC Drug List Implementation – Board Side....189
Add a New IACUC Drug....189
Edit IACUC Drug....190
Delete IACUC Drug....192
Merge IACUC Drug Records....193
Tranquilizing Drug Configuration List....195
Tranquilizing Drug List Implementation – Application Side....196
Tranquilizing Drug List Implementation – Board Side....196
Add a New Tranquilizing Drug....196
Edit Tranquilizing Drug....198
Delete Tranquilizing Drug....200
Merge Tranquilizing Drug Records....200
USDA Class Configuration List....202
USDA Animal Categories....203
USDA Class List Implementation – Application Side....204
USDA Class List Implementation – Board Side....204
Add USDA Class....205
Edit USDA Class....206
Delete USDA Class....207
Vaccination Configuration List....208
Vaccination List Implementation – Application Side....209
Vaccination List Implementation – Board Side....209
Add Vaccination....209

Edit Vaccination..... 211
Delete Vaccination..... 212
Issue Reporting Types..... 213
Issue Type Implementation – Application Side..... 214
Issue Type Implementation – Board Side..... 215
Add Issue Type..... 215
Edit Issue Type..... 216
Delete Issue Type..... 218
Cost Center List / Account List..... 219
Add Cost Center..... 219
Edit Cost Center..... 225
Cost Center Setup Tab..... 230
Cost Center Transfer Tab..... 233
Transfer Personnel..... 234
Personnel Changes in Cost Center Currently Open for Editing..... 235
Transfer Cages..... 236
Transfer Transactions..... 237
Charges Tab..... 238
Invoices Tab..... 241
Access Audit Log Tab..... 241
Delete Cost Center..... 242

Introduction

The iRIS™ system provides numerous picklists on system pages and forms. Some of these lists exist to save users the time and trouble of manually typing in frequently used data items. Other lists exist to enforce data validation requirements.

In the Animal Resource Center module, lists are managed on the **List Maintenance Setup** tab. To access this area, navigate to Animal Resource Center > Review Board Administration > **List Maintenance Setup** tab.



*Note that many of the lists linked here are also available in the **List Maintenance Setup** tab under Animal Resource Center > 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 list setup and configuration requirements.*

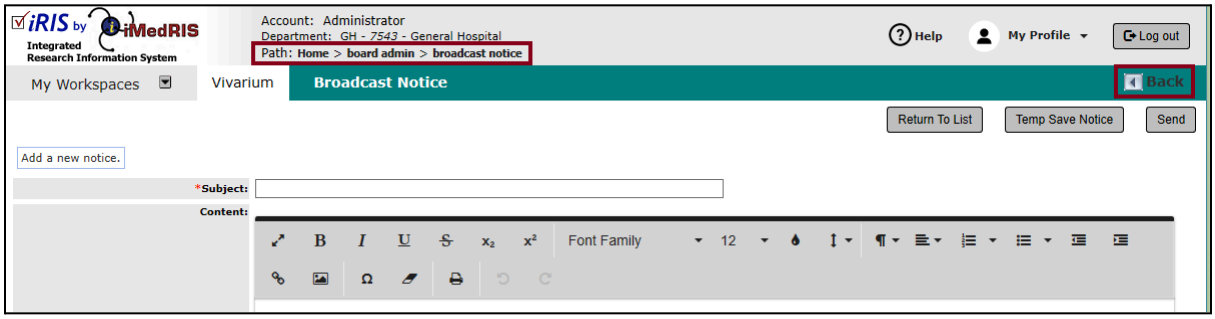
Navigation in iRIS™

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.

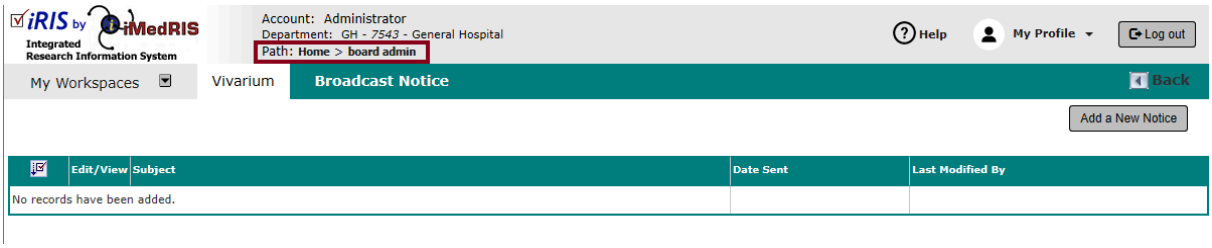
Path Directory Tree

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

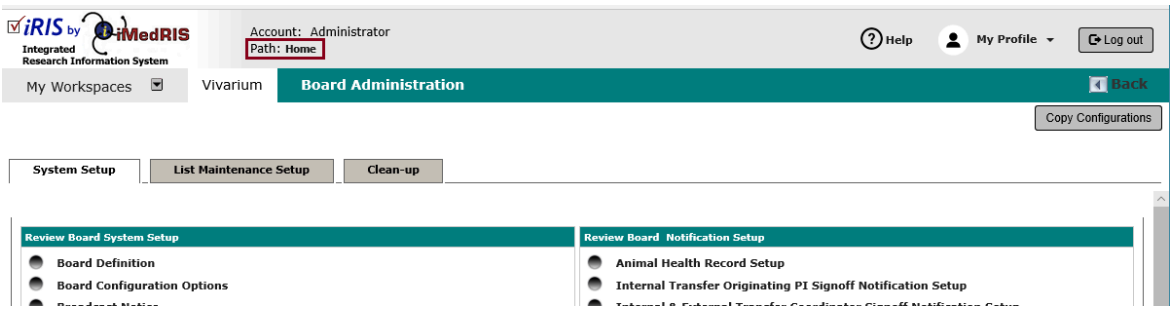
In the example shown the user is viewing the **Broadcast Notice Add a new notice** page. This page is nested three levels beneath the main workspace page, as indicated by the three links available in the **Path** directory tree: **Home**, **board admin** and **broadcast notice**.



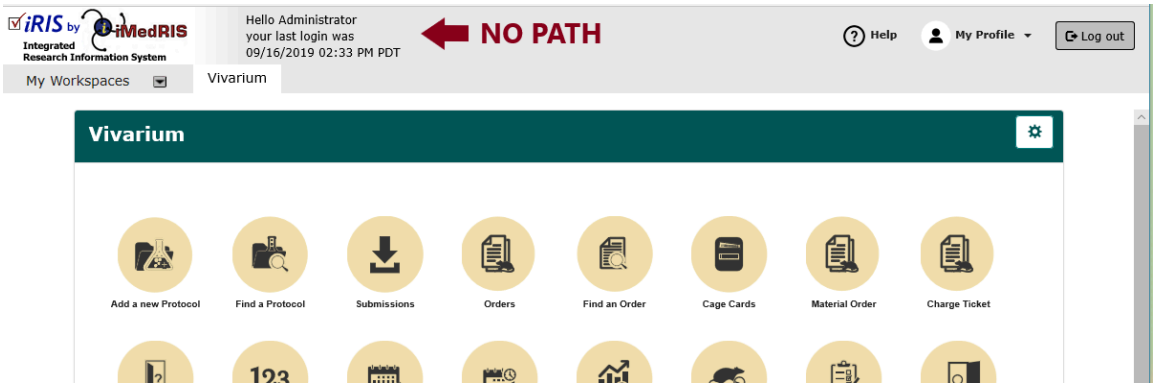
Click on **broadcast notice** in the **Path** to navigate up one level in the directory tree, to the main **Broadcast Notice** page. There are now two levels in the **Path** directory tree: **board admin** and **Home**.



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**.

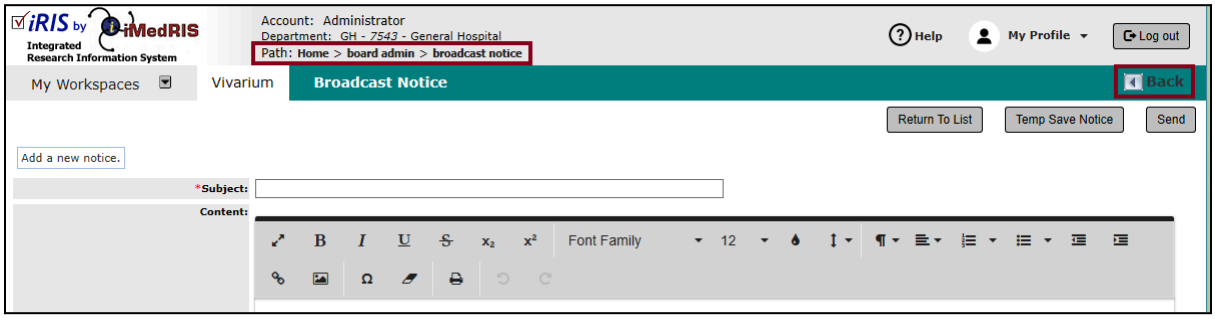


Click on **Home** in the **Path** to navigate up one level in the directory tree, to the main Workspace page. No Path item is displayed here because the user is now at the top-most level of the directory tree.

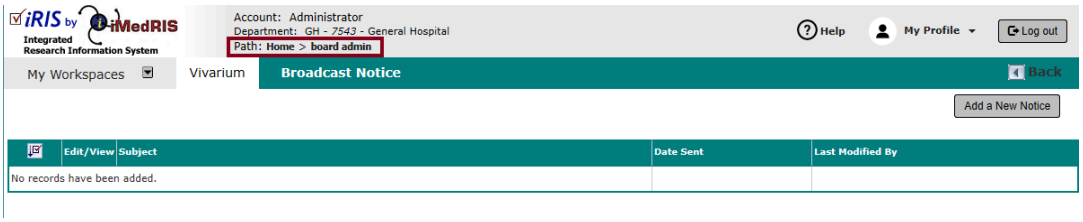


Back Button

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:

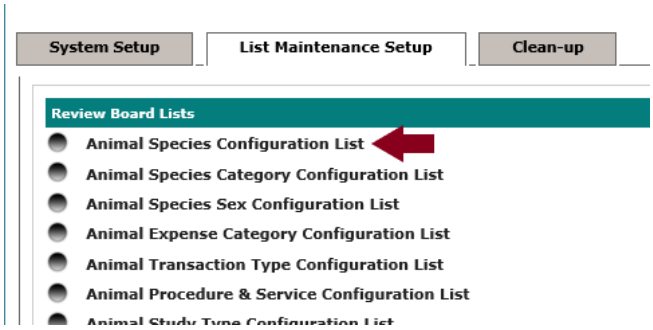


Clicking the **Back** button on the **Broadcast Notice** page returns the user to the Board Administration page, as indicated by the last link in the **Path** directory tree shown in the screenshot above.

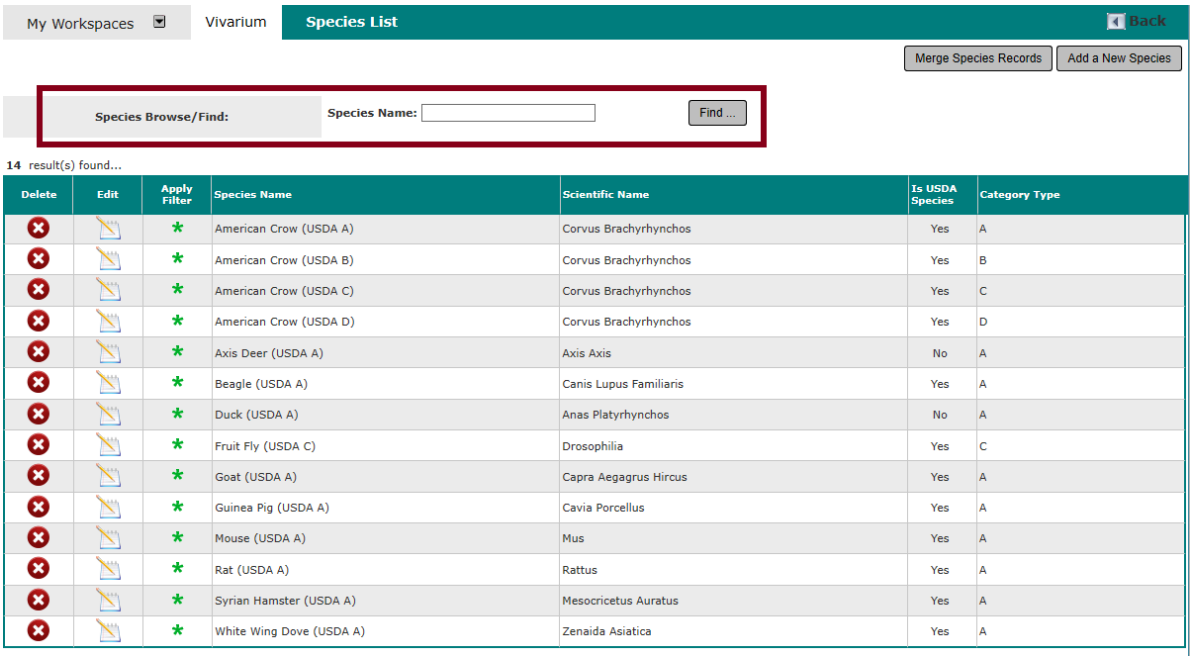
*Note that where the **Back** button appears on a page with editable fields or document upload controls, clicking the button before saving changes returns the user to the same location as the last link shown in the **Path** without saving changes.*

Animal Species Configuration List

This is where an institution maintains its list of animal species approved for use as study subjects. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Species Configuration List** link.



The **Species List** page is opened. Previously added species records are summarized in a table, with a search form at the top of the page. Enter all or part of the desired **Species Name** and click the **Find…** button to filter the table by that name.



Delete	Edit	Apply Filter	Species Name	Scientific Name	Is USDA Species	Category Type
		*	American Crow (USDA A)	Corvus Brachyrhynchos	Yes	A
		*	American Crow (USDA B)	Corvus Brachyrhynchos	Yes	B
		*	American Crow (USDA C)	Corvus Brachyrhynchos	Yes	C
		*	American Crow (USDA D)	Corvus Brachyrhynchos	Yes	D
		*	Axis Deer (USDA A)	Axis Axis	No	A
		*	Beagle (USDA A)	Canis Lupus Familiaris	Yes	A
		*	Duck (USDA A)	Anas Platyrhynchos	No	A
		*	Fruit Fly (USDA C)	Drosophilia	Yes	C
		*	Goat (USDA A)	Capra Aegagrus Hircus	Yes	A
		*	Guinea Pig (USDA A)	Cavia Porcellus	Yes	A
		*	Mouse (USDA A)	Mus	Yes	A
		*	Rat (USDA A)	Rattus	Yes	A
		*	Syrian Hamster (USDA A)	Mesocricetus Auratus	Yes	A
		*	White Wing Dove (USDA A)	Zenaida Asiatica	Yes	A

Note the **Category Type** column at far right. This field is used to include a USDA Pain and Distress Category assignment for the species (see next section).

USDA Pain and Distress Categories

In compliance with the Animal Welfare Act (AWA) of 1966, the United States Department of Agriculture (USDA) and the United States Department of Health and Human Services (HHS) have oversight responsibility to ensure animal research subjects are treated humanely and cared for properly.

As part of its oversight role, the USDA has developed Pain and Distress Category guidelines for use by institutions engaged in animal research activity. The guidelines provide an alphabetic letter scale from A-E to indicate the anticipated level of animal subject pain and/or distress in a planned study.

A = Observational activities that do not perturb the natural activities of the animals, (e.g., no interaction with or disturbance of animal's natural wild state). This category generally does not require an Animal Use Protocol. Contact the IACUC office for verification of this classification.

B = Animals being bred, conditioned or held for future use in research, testing, or teaching but not yet used for such purpose. Activities are limited to those needed for routine herd or colony maintenance.

C = Animals upon which research, testing or teaching procedures are conducted that do not involve more than momentary pain or distress. "No more than momentary pain or distress" is interpreted such as that experienced during injections or brief restraint.

D = Animals upon which research, testing teaching, or restraint procedures are conducted which involve more than momentary pain or distress to the animals, but for which appropriate anesthetic, analgesic, or tranquilizing drugs will be administered.

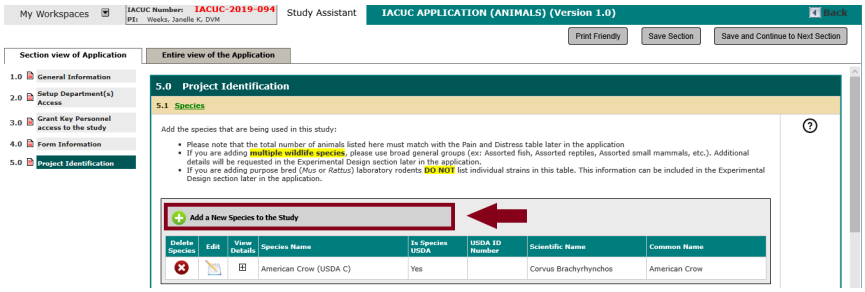
E = Animals upon which teaching, experiments, research, surgery, or tests are conducted which have the potential to involve more than momentary pain or distress to the animals, and for which the use of appropriate anesthetic, analgesic, or tranquilizing drugs would adversely affect the procedures, results, or interpretation of the teaching, research, experiments, surgery, or tests. A written explanation of the procedures producing pain or distress in these animals and the reasons such drugs will not be provided by the investigator must be included in this protocol.

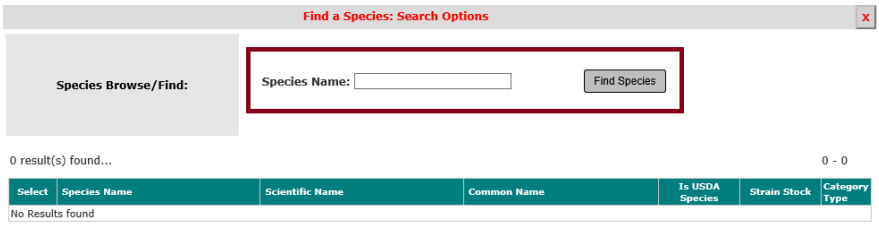
For more information about implementation of AWA requirements in institutional research, visit the APHIS Animal Welfare portal at https://www.aphis.usda.gov/aphis/ourfocus/animalwelfare.

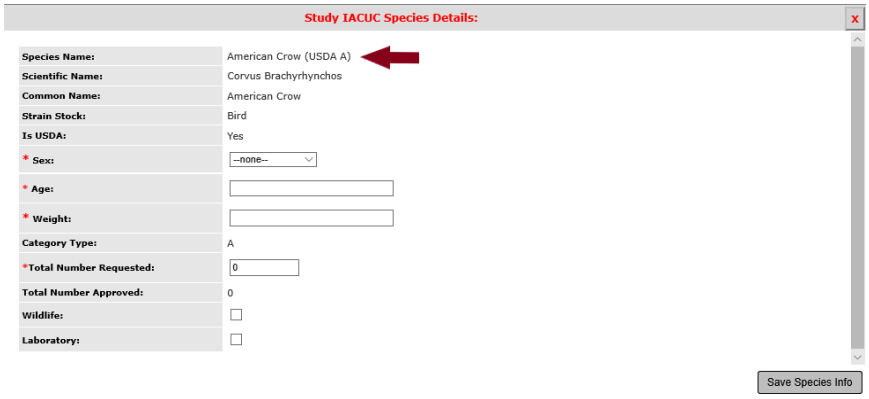
Species List Implementation – Application Side

The species list is employed in the following areas on the application side of iRIS™.

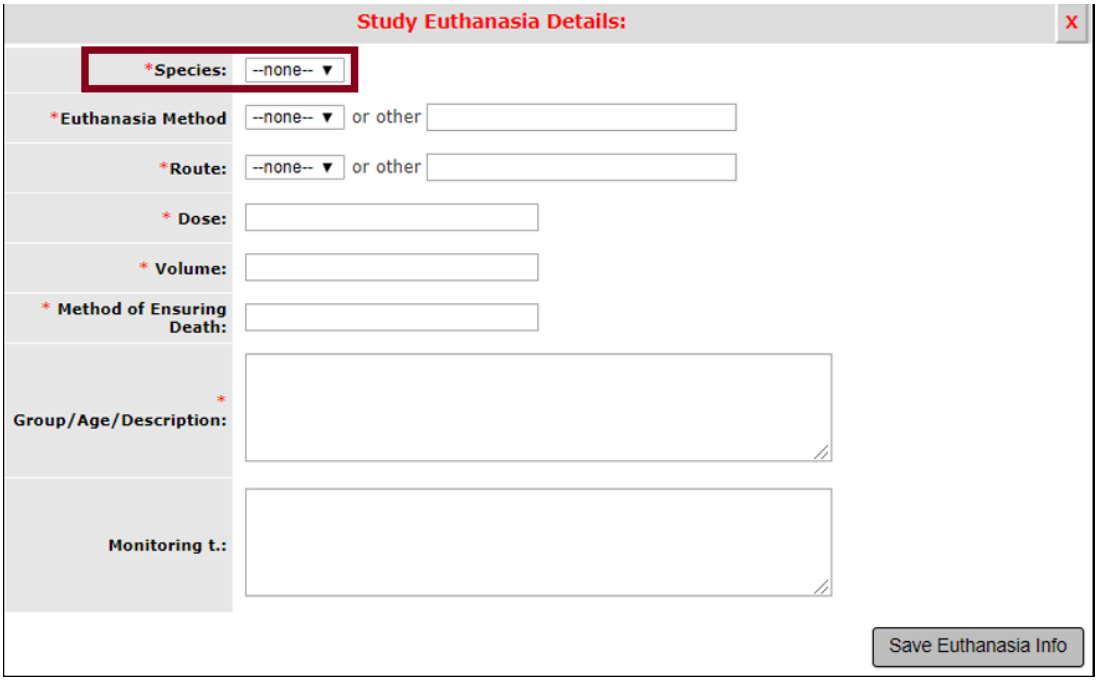
IACUC / ARC Study Application — when the user clicks the **Add A New Species to the Study** button, popup dialogs are provided for species search and selection



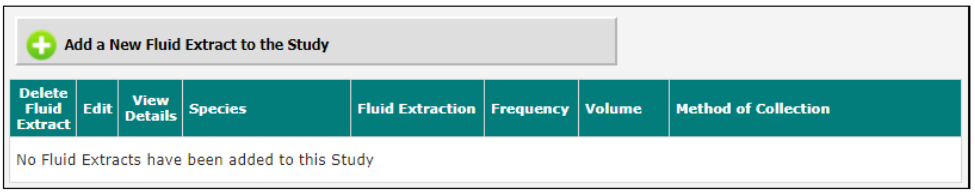


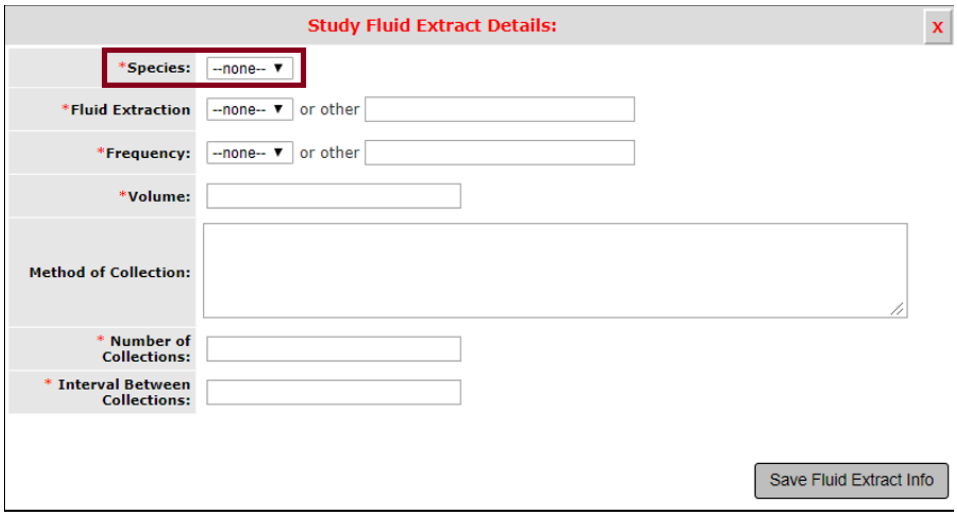


IACUC / ARC Study Application — the species list is employed in the **Study Euthanasia Details** popup, which is accessed via the **Add a New Euthanasia to the Study** button

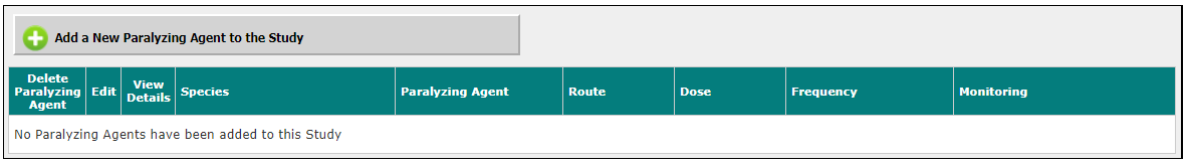


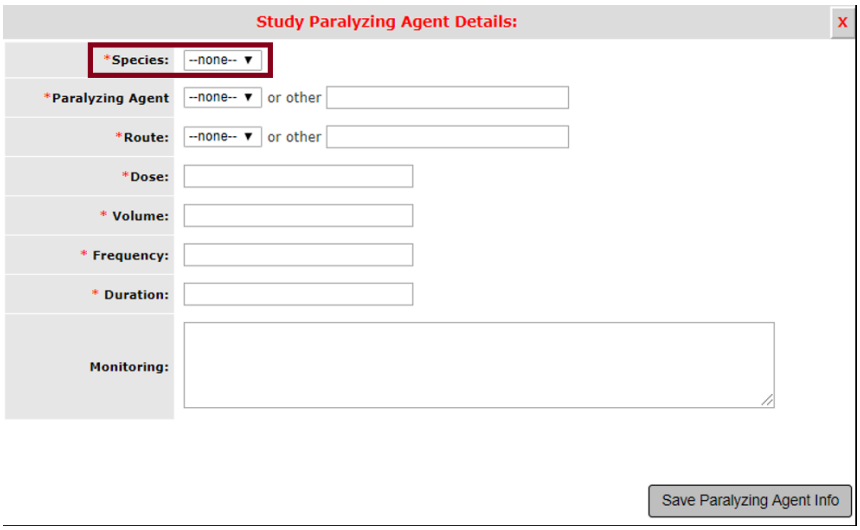
IACUC / ARC Study Application — the species list is employed in the **Study Fluid Extract Details** popup, which is accessed via the **Add a New Fluid Extract to the Study** button



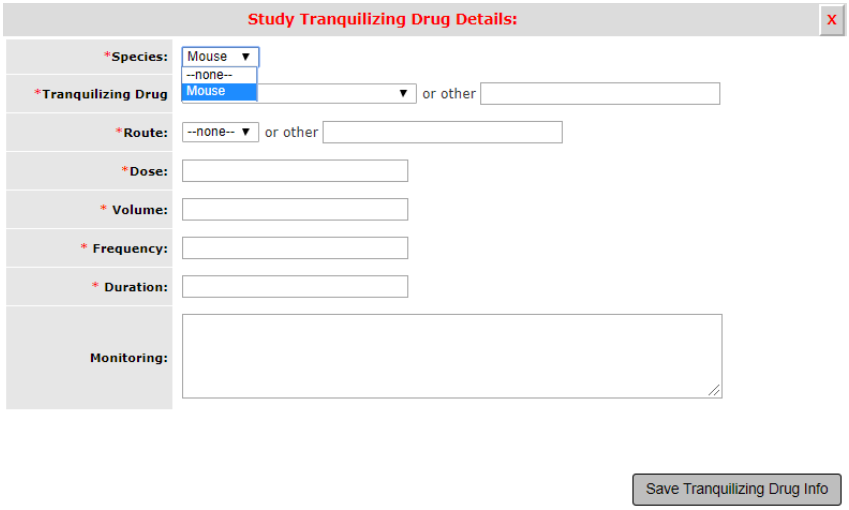


IACUC / ARC Study Application — the species list is employed in the **Study Paralyzing Agent Details** popup, which is accessed via the **Add a New Paralyzing Agent to the Study** button

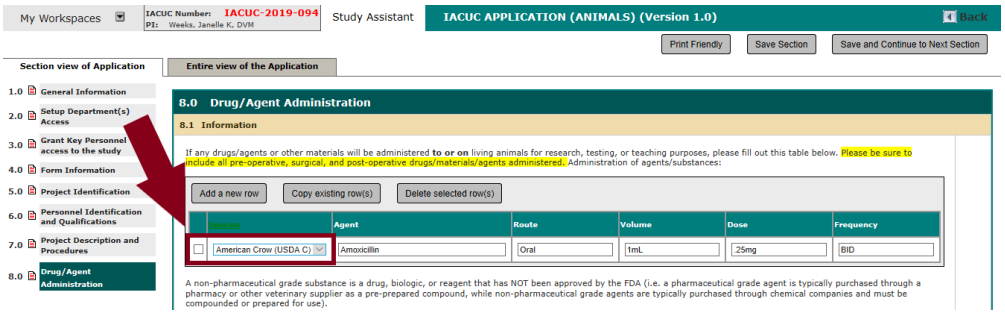




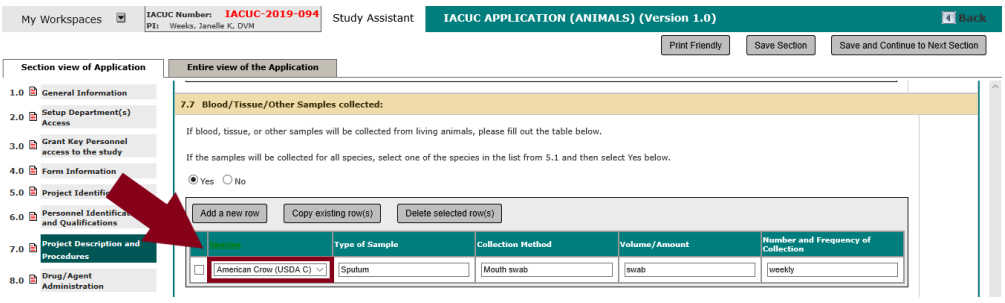
IACUC / ARC Study Application — the species list is employed in the **Study Tranquilizing Drug Details** popup, which is accessed via the **Add a New Tranquilizing Drug to the Study** button



IACUC / ARC Study Application — the species list is employed in the **Drug/Agent Administration** section of the application form

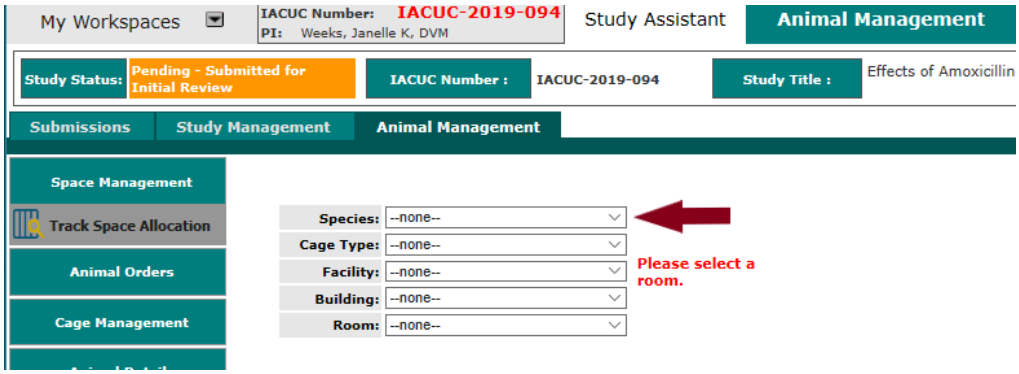


IACUC / ARC Study Application — the species list is employed in the **Blood/Tissue/Other Samples collected** question in the **Project Description and Procedures** section of the application form

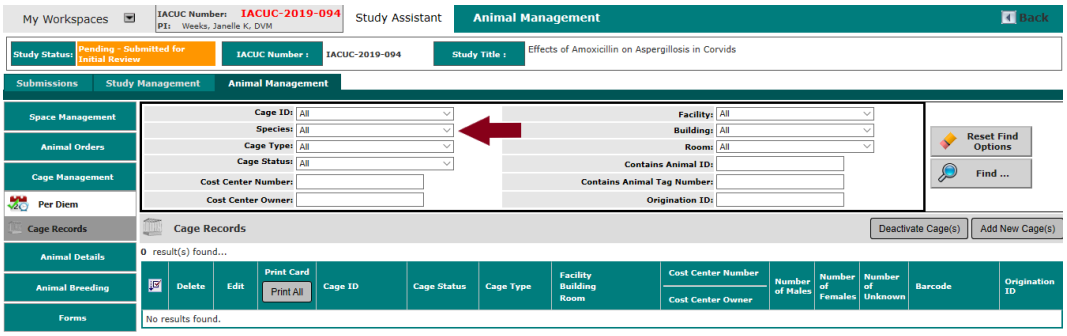


For more information about the IACUC study application, see the iRIS™ IACUC Assistant - IACUC Assistant Manual.

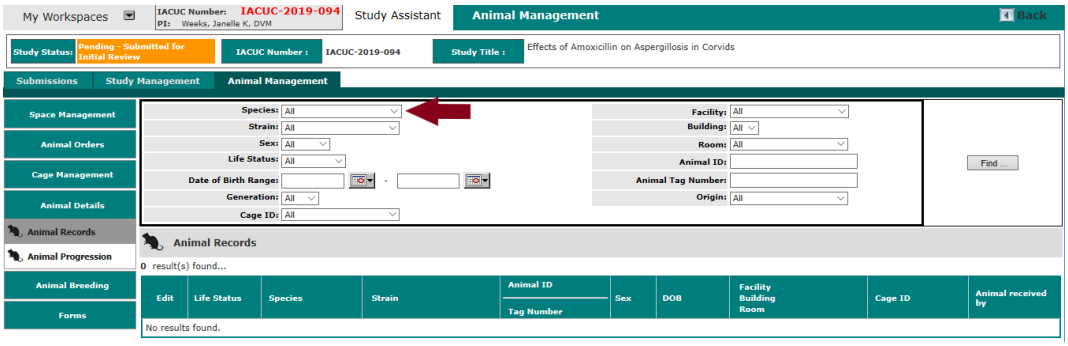
Submissions — the species list is employed in the search form provided in the **Track Space Allocation** section of the **Animal Management** tab when reviewing a submission



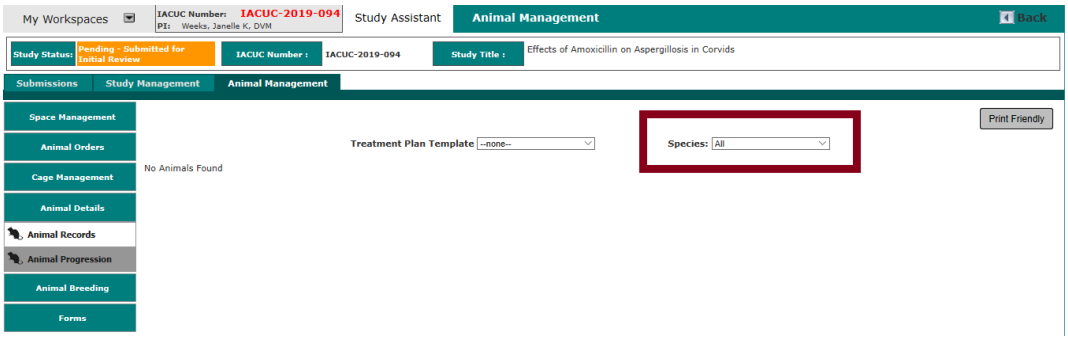
Submissions — the species list is employed in the search form provided in the **Cage Records** section of the **Animal Management** tab when reviewing a submission



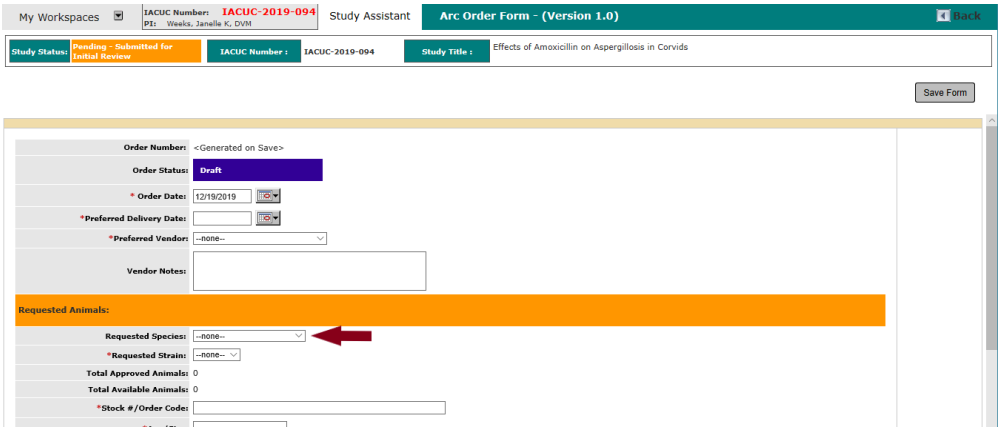
Submissions — the species list is employed in the search form provided in the **Animal Records** section of the **Animal Management** tab when reviewing a submission.



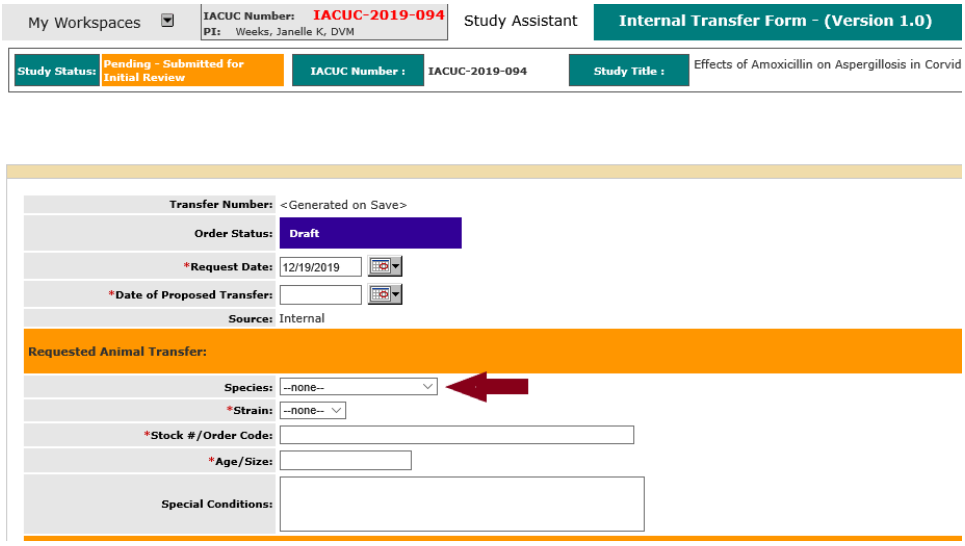
Submissions — the species list is employed in the search form provided in the **Animal Progression** section of the **Animal Management** tab when reviewing a submission



Submissions — the species list is employed in the **Requested Animals** section of the **Arc Order Form**



Submissions — the species list is employed in the **Requested Animal Transfer** section of the **Internal Transfer Form**

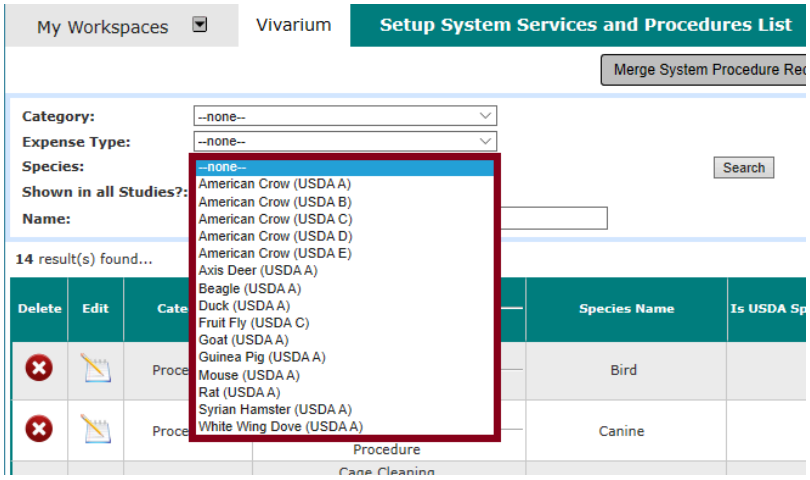


ARC Reports — the species list is employed in the report criteria panel for each of the following ARC Reports: **Animal Numbers by USDA Category**, **Census Report** and **List of Cages by Species**; see the Animal Resource Center – Reports manual for more information

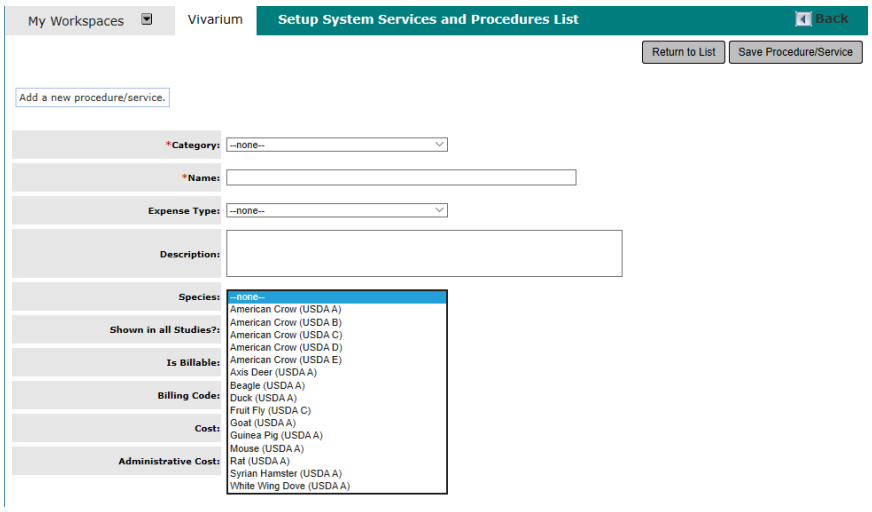
Species List Implementation – Board Side

The species list is employed in the following areas on the review board / system setup side of iRIS™.

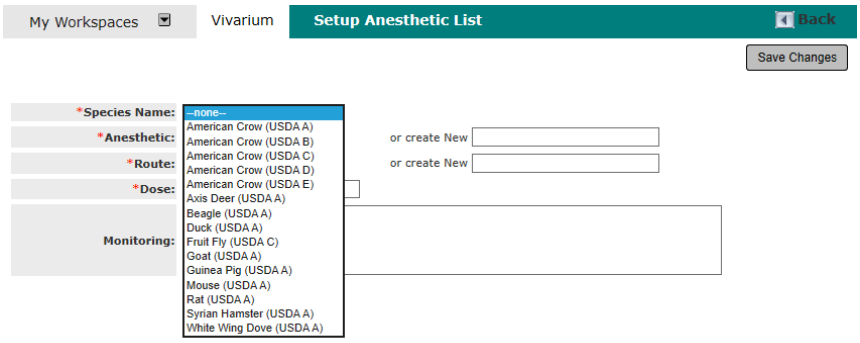
Setup System Service and Procedures List page — the species list is included in the search form at the top of the **Setup System Services and Procedures List** page, which is accessed via Animal Resource Center > Review Board Administration > List Maintenance Setup tab > Animal Procedure & Service Configuration List link



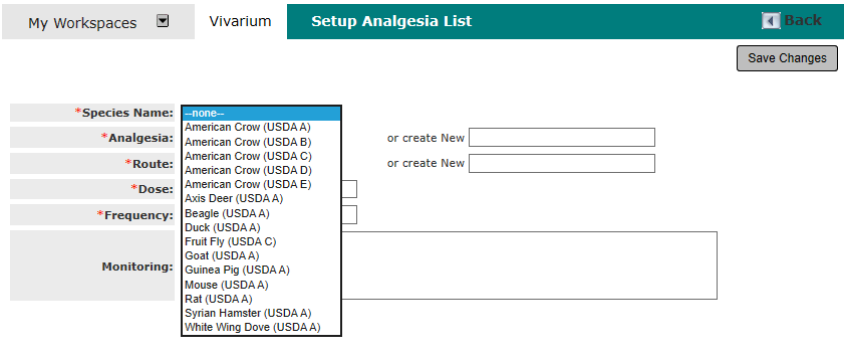
Setup System Service and Procedures List add/edit panel — the species list is included in the **Setup System Services and Procedures List** add/edit panel, which is accessed via Animal Resource Center > Review Board Administration > List Maintenance Setup tab > Animal Procedure & Service Configuration List link



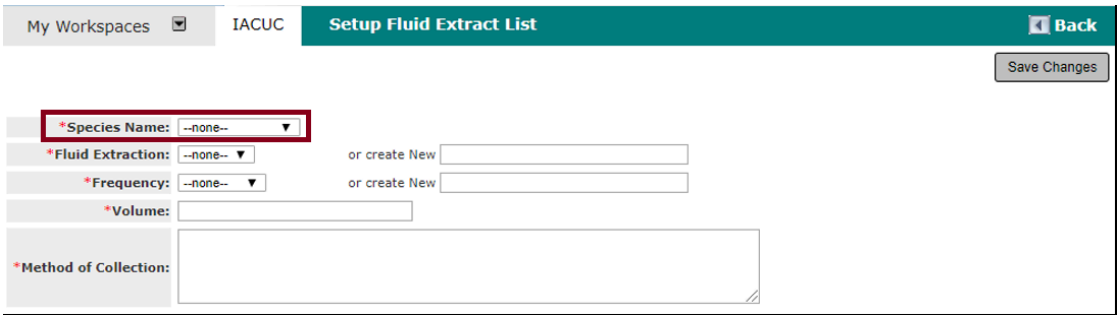
Setup Anesthetic List add/edit panel — the species list is included in the **Setup Anesthetic List** add/edit panel, which is accessed via Animal Resource Center > Review Board Administration > List Maintenance Setup tab > Anesthetic Configuration List link



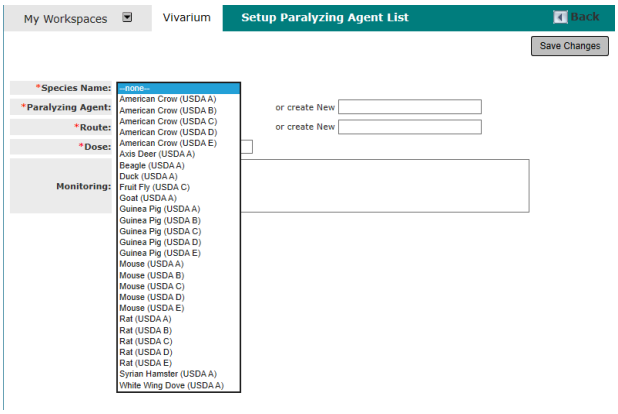
Setup Analgesia List add/edit panel — the species list is included in the **Setup Analgesia List** add/edit panel, which is accessed via Animal Resource Center > Review Board Administration > List Maintenance Setup tab > Analgesia Configuration List link



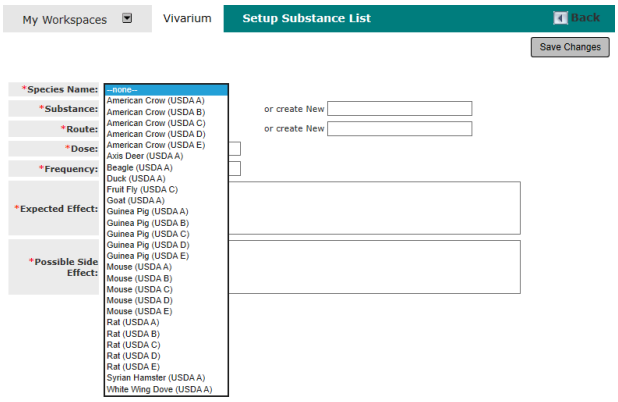
Setup Fluid Extract List add/edit panel — the species list is included in the **Setup Fluid Extract List** add/edit panel, which is accessed via IACUC/Animal Resource Center > Review Board Administration > List Maintenance Setup tab > Fluid Extract Configuration List link



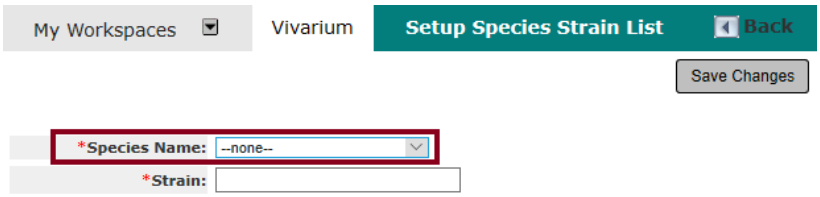
Setup Paralyzing Agent List add/edit panel — the species list is included in the **Setup Paralyzing Agent List** add/edit panel, which is accessed via Animal Resource Center > Review Board Administration > List Maintenance Setup tab > Paralyzing Agent Configuration List link



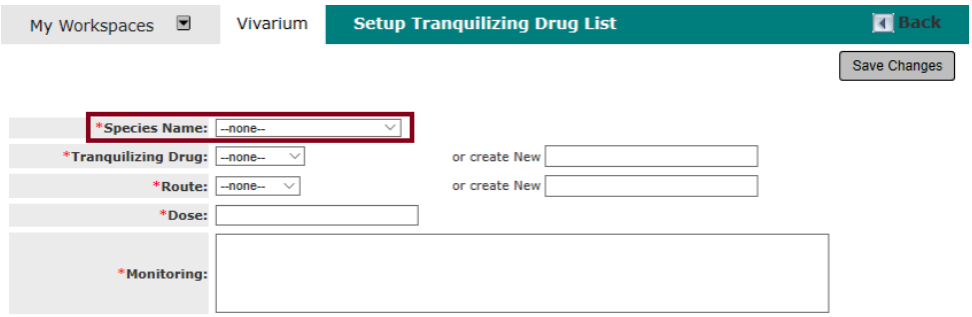
Setup Substance List add/edit panel — the species list is included in the **Setup Substance List** add/edit panel, which is accessed via Animal Resource Center > Review Board Administration > List Maintenance Setup tab > Substance Configuration List link



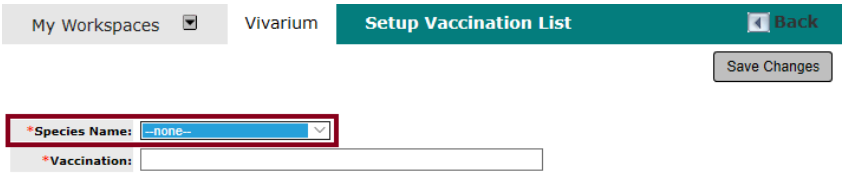
Setup Strain List add/edit panel — the species list is included in the **Setup Strain List** add/edit panel, which is accessed via Animal Resource Center > Review Board Administration > List Maintenance Setup tab > Strain Configuration List link



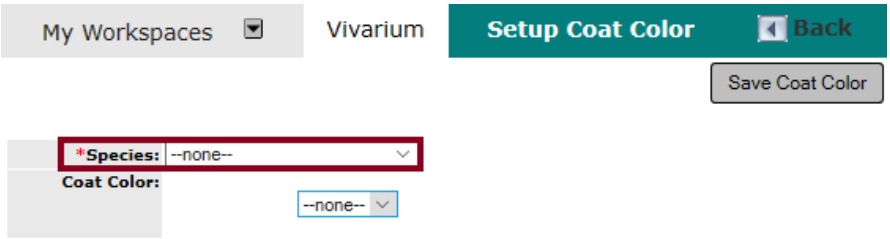
Setup Tranquilizing Drug List add/edit panel — the species list is included in the **Setup Tranquilizing Drug List** add/edit panel, which is accessed via Animal Resource Center > Review Board Administration > List Maintenance Setup tab > Tranquilizing Drug Configuration List link



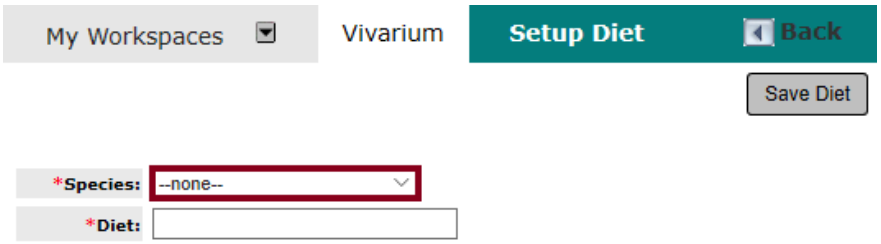
Setup Vaccination List add/edit panel — the species list is included in the **Setup Vaccination List** add/edit panel, which is accessed via Animal Resource Center > Review Board Administration > List Maintenance Setup tab > Vaccination Configuration List link



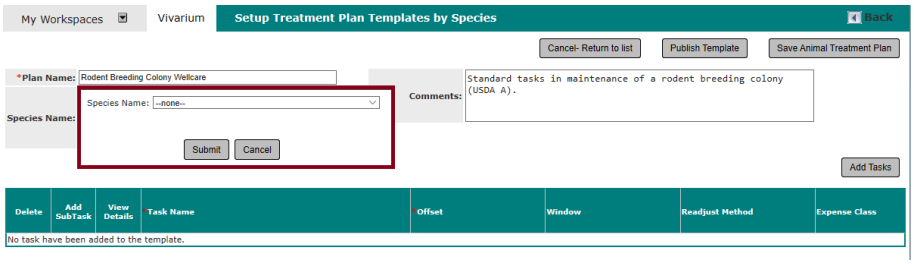
Setup Coat Color List add/edit panel — the species list is included in the **Setup Coat Color List** add/edit panel, which is accessed via IACUC/Animal Resource Center > Review Board Administration > System Setup tab > Setup Coat Color link



Setup Diet add/edit panel — the species list is included in the **Setup Diet** add/edit panel, which is accessed via IACUC/Animal Resource Center > Review Board Administration > System Setup tab > Setup Diet link

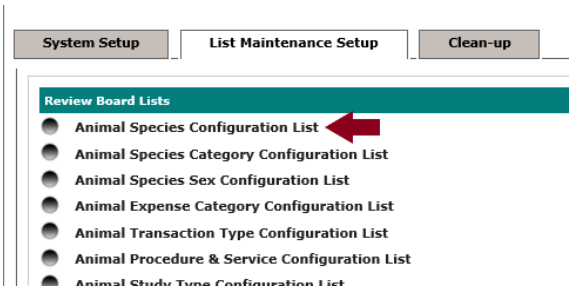


Setup Treatment Plan Templates by Species add / edit / copy panels — the species list is included in the **Setup Treatment Plan Templates by Species** add/edit/copy panels, which are accessed via Animal Resource Center > Review Board Administration > System Setup tab > Setup Treatment Plan Templates by Species link

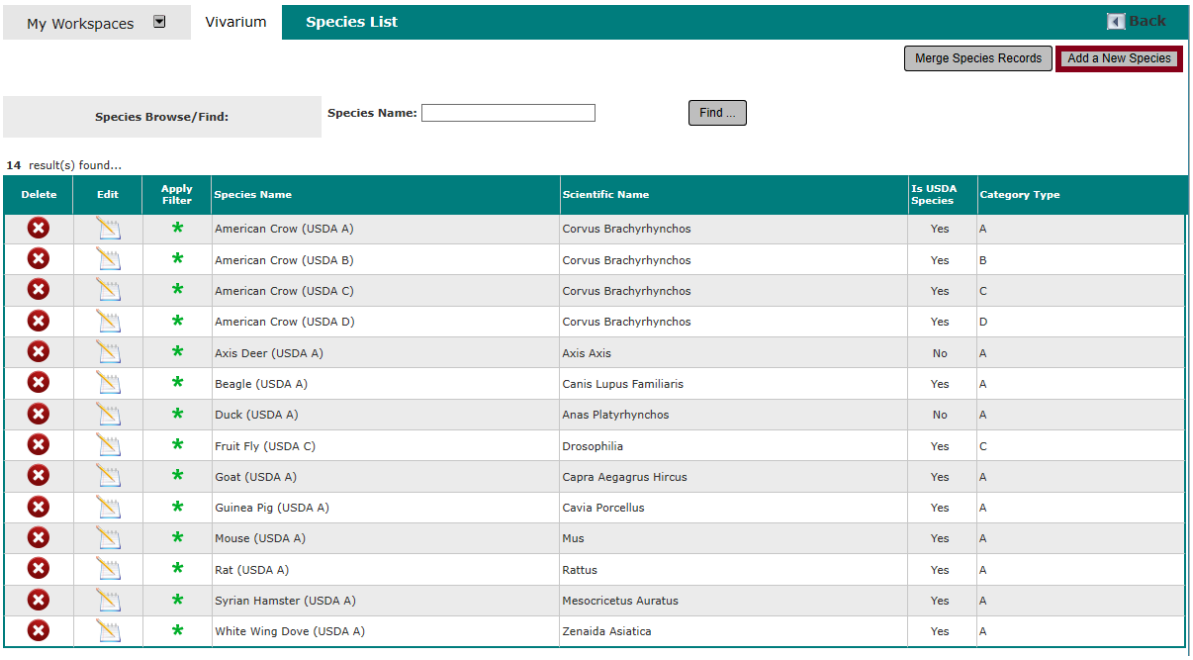


Add Species

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Species Configuration List** link.



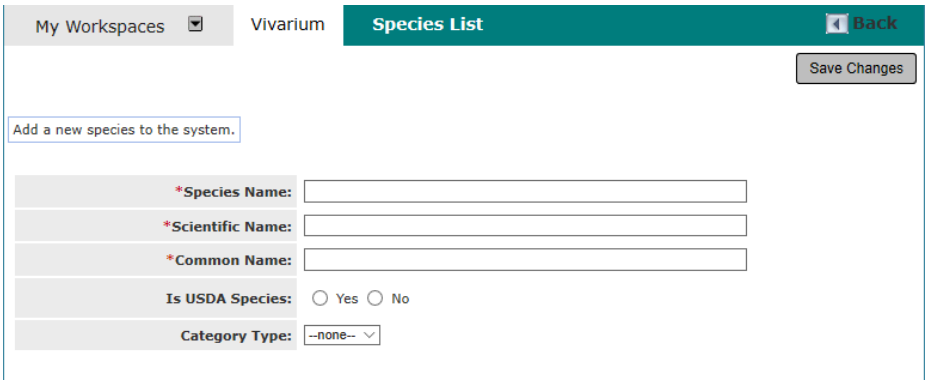
The **Species List** page is opened.



In the screenshot above one species record has been created for each of ten animal species, and four species records have been created for American Crow. Most of these records have a USDA Pain and Distress **Category Type** of "A" assigned. As described in the USDA Pain and Distress Categories section of this manual, a type of "A" signifies "Observational activities that do not perturb the natural activities of the animals, (e.g., no interaction with or disturbance of animal's natural wild state)".

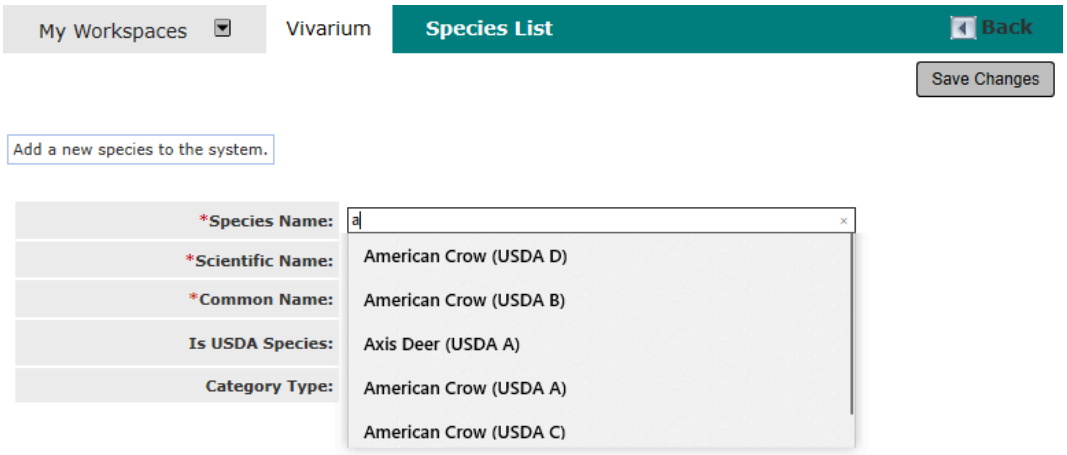
Because most animal research subjects will experience "interaction with" and "disturbance of" their "natural wild state", it is usually necessary to create multiple records for each species: one for each USDA Pain and Distress **Category Type**.

To add a new species record, click the **Add a New Species** button. The **Add a new species to the system** panel opens.

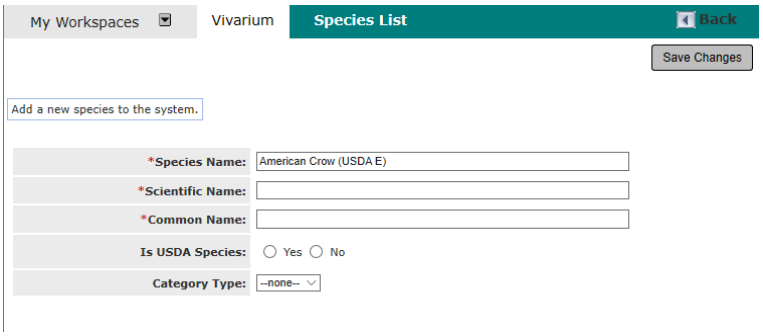


Previously entered species records are made available as dynamic picklists in the **Species Name**, **Scientific Name** and **Common Name** fields to facilitate creation of multiple records for the same species. In the following example a fifth species record will be added for American Crow, with a USDA Pain and Distress **Category Type** of "E".

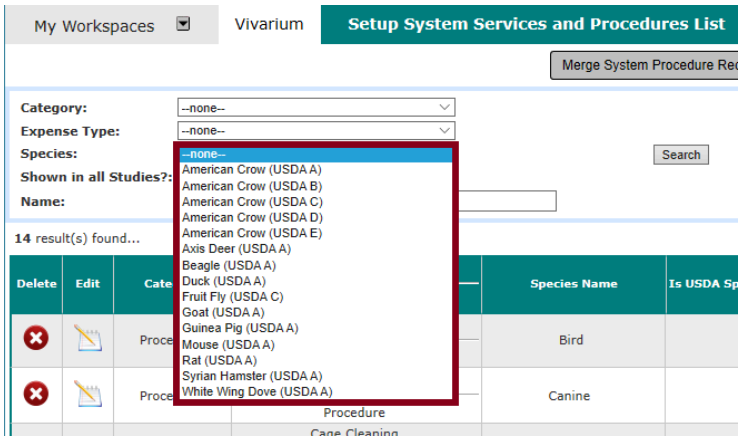
Click in the **Species Name** field and enter the first letter of the desired name. A dropdown list of previously created **Species Name** s appears. If a version of the desired name is included, click to select it, then make any necessary changes to the field. If the desired name is not in the list, it can be typed into the field manually.



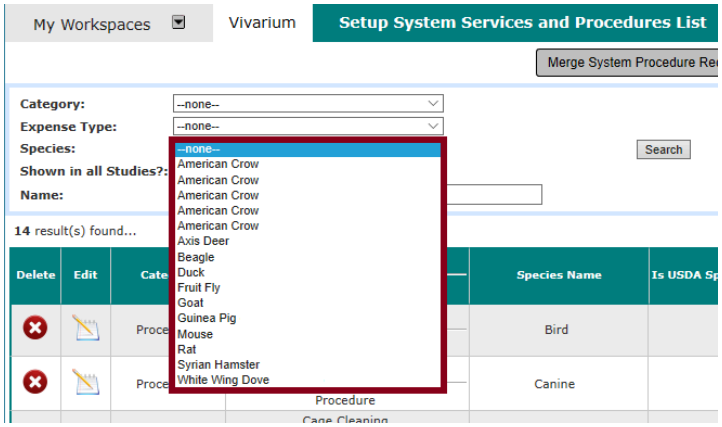
In the example shown below one of the pre-existing American Crow records was selected for **Species Name**, then the field was edited to create a new name, "American Crow (USDA E)".



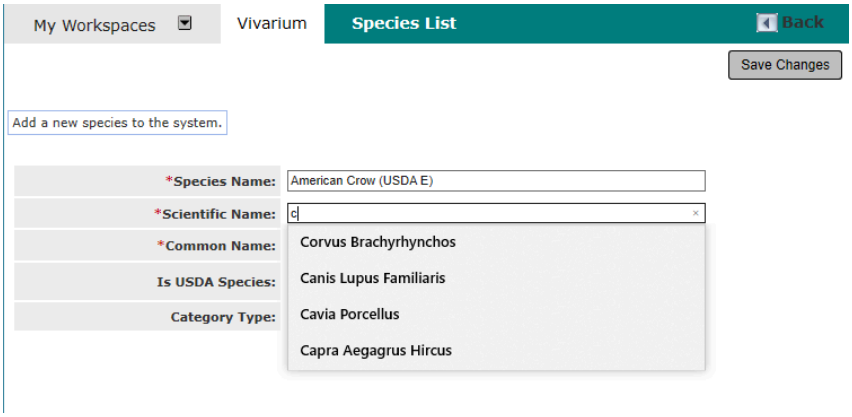
Because there can be multiple versions of the same species record, each with a different **Category Type** assigned, it's a good practice to include the **Category Type** designation when entering or revising the **Species Name**. Doing so ensures that users will be able to distinguish between records in the species dropdown list wherever it appears in the iRIS™ system.



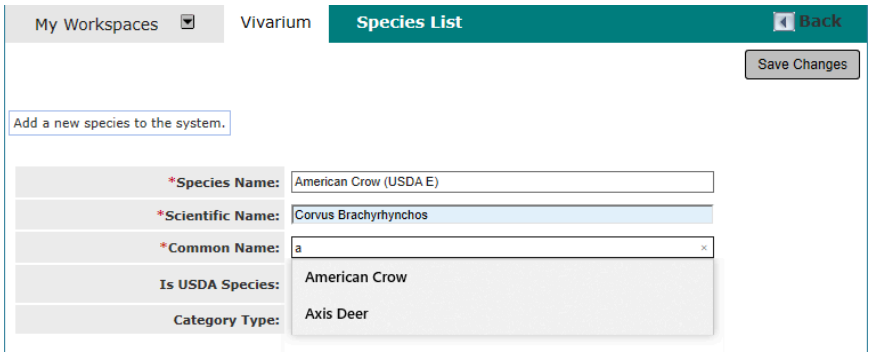
In the example above the **Category Type** is included in the **Species Name**. The example below demonstrates the difficulty in distinguishing between species records when the **Category Type** is *not* included in the **Species Name**.



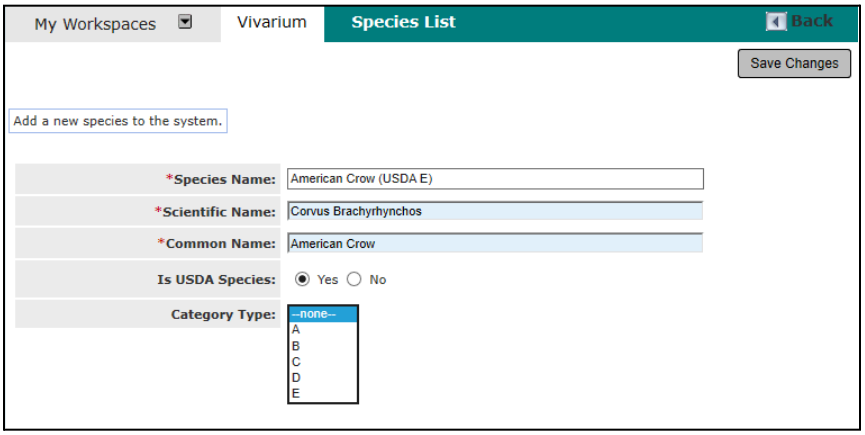
Click in the **Scientific Name** field and enter the first letter of the desired name. A dropdown list of previously created **Scientific Name**s appears. If the desired name is included, click to select it. If the desired name is not in the list, it can be typed into the field manually.



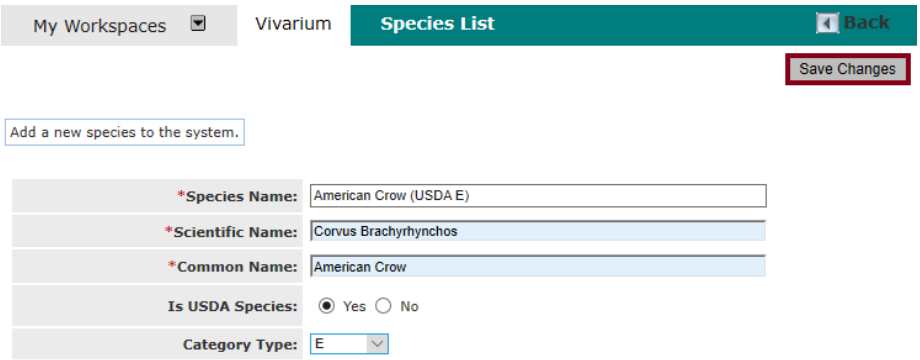
Click in the **Common Name** field and enter the first letter of the desired name. A dropdown list of previously created species names appears. If the desired name is included, click to select it. If the desired name is not in the list, it can be typed into the field manually.



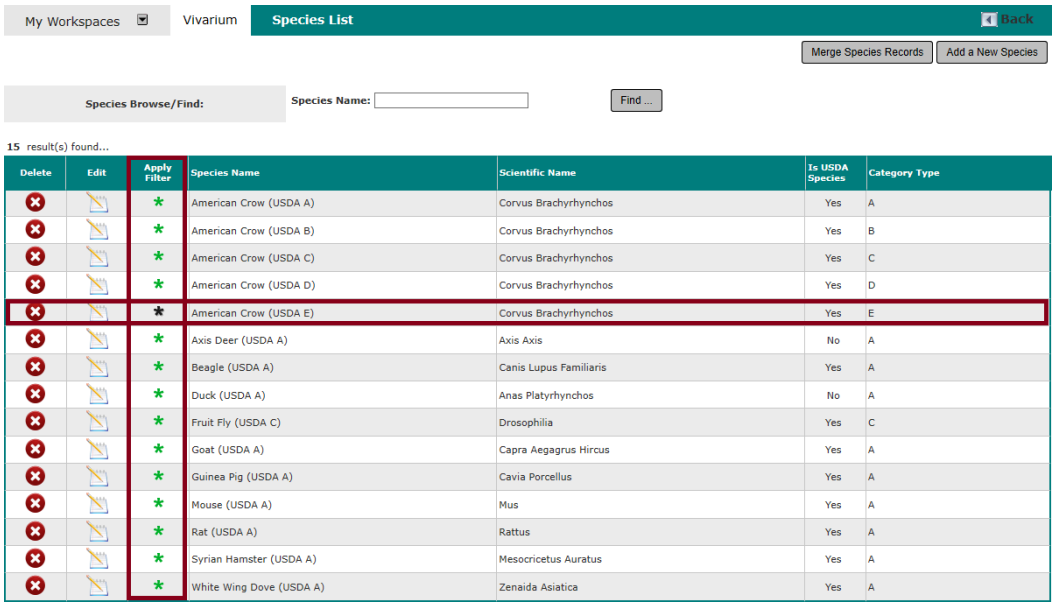
Click to select “Yes” or “No” for **Is USDA Species**, then click on the **Category Type** dropdown to open the category list and click on the desired list item to select it.



The completed form is shown below.



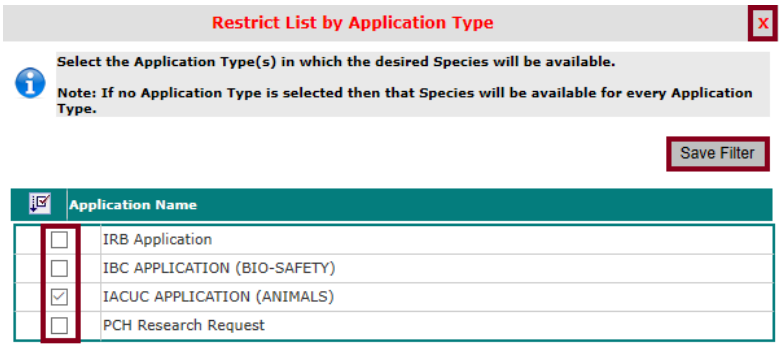
Click the **Save Changes** button to save the new species record and return to the main **Species List** page. The new record is added to the list. Notice that in the new record, the asterisk icon in the **Apply Filter** column is black.



A green asterisk in the **Apply Filter** column indicates a filter has been applied to limit the species' availability to certain study application types.

A black asterisk in the **Apply Filter** column indicates the species is available for assignment to any study application type.

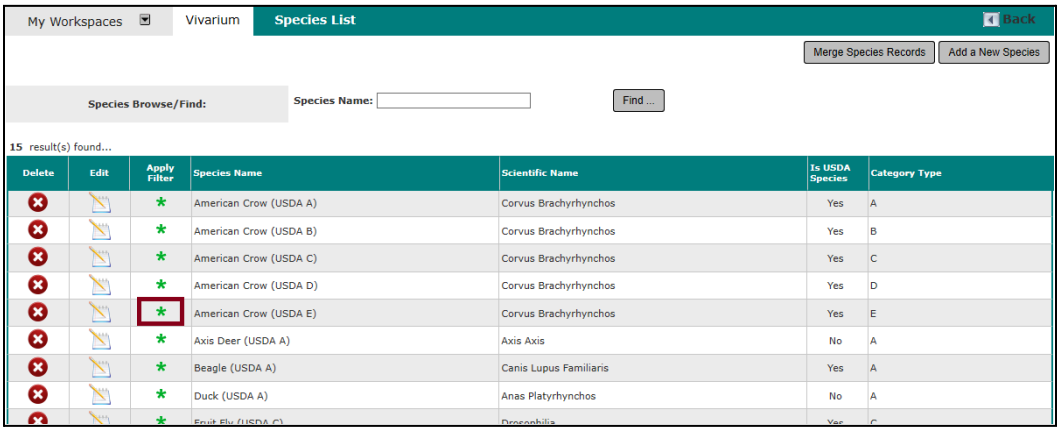
Click the **Apply Filter** icon to view, edit or enter filter details for the species. The **Restrict List by Application Type** popup window opens.



Click the close icon (red X in upper right corner) to close the popup without limiting the filter to certain study types.

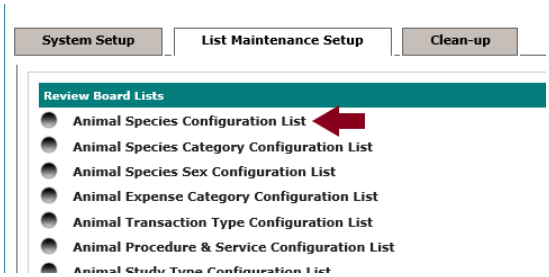
To limit the species to certain study application types, select the checkbox(es) for the desired **Application Name** item(s). Click the **Save Filter** button to save changes and close the popup window.

In the screenshot above, the black asterisk was clicked on the "American Crow (USDA E)" record and IACUC APPLICATION (ANIMALS) is selected. When the **Save Filter** button is clicked, the filter setting is updated on the **Species List** page.

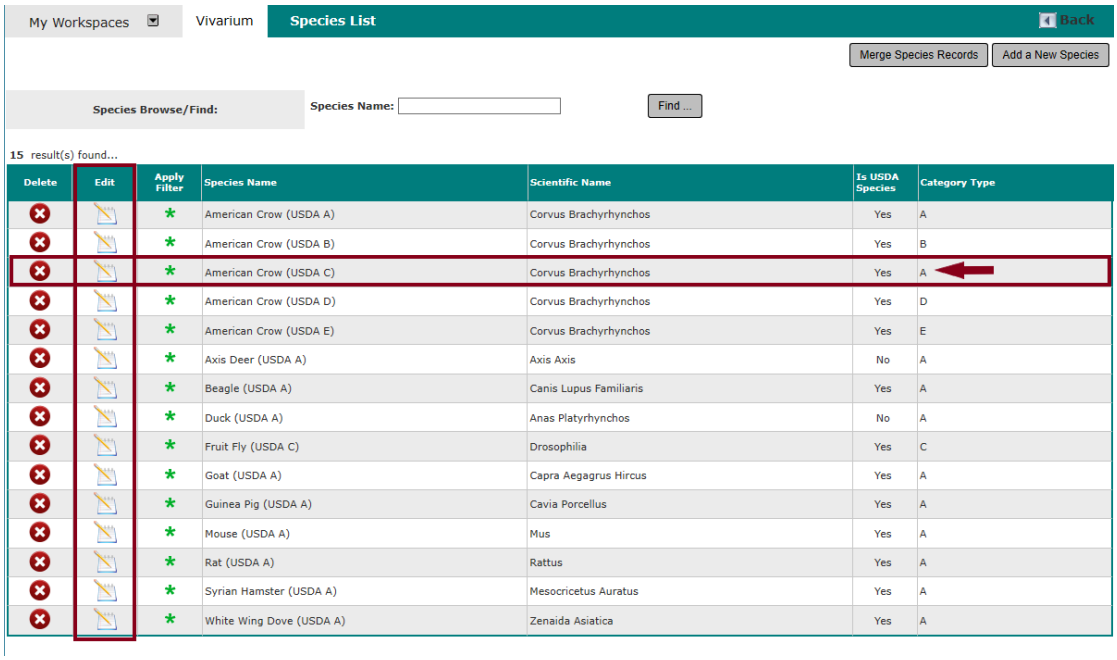


Edit Species

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Species Configuration List** link.



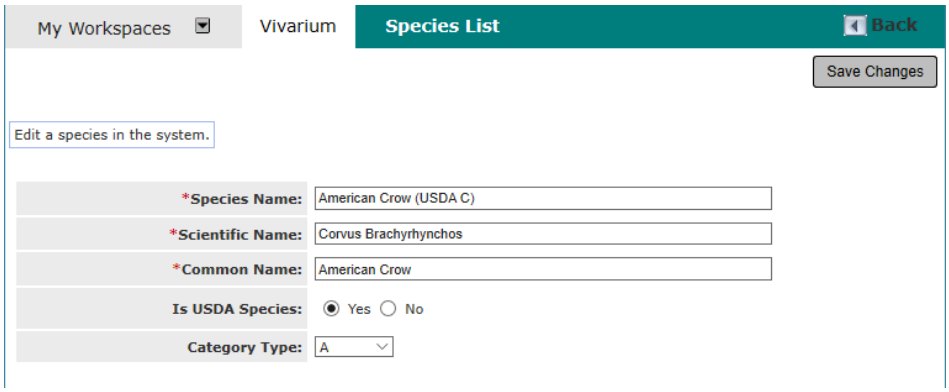
The **Species List** page is opened.



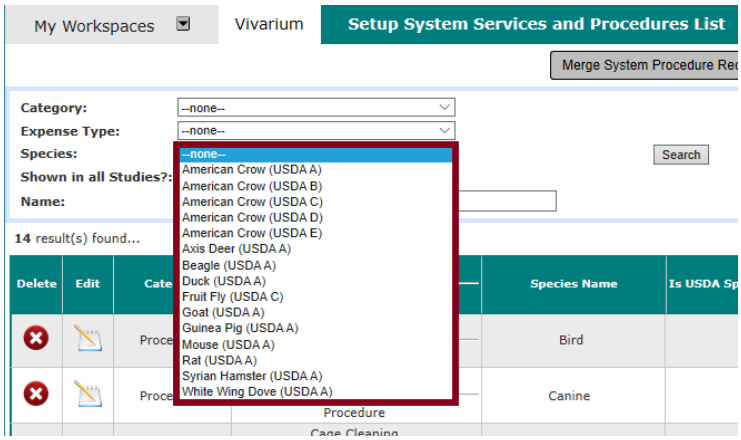
Delete	Edit	Apply Filter	Species Name	Scientific Name	Is USDA Species	Category Type
		*	American Crow (USDA A)	Corvus Brachyrhynchos	Yes	A
		*	American Crow (USDA B)	Corvus Brachyrhynchos	Yes	B
		*	American Crow (USDA C)	Corvus Brachyrhynchos	Yes	A
		*	American Crow (USDA D)	Corvus Brachyrhynchos	Yes	D
		*	American Crow (USDA E)	Corvus Brachyrhynchos	Yes	E
		*	Axis Deer (USDA A)	Axis Axis	No	A
		*	Beagle (USDA A)	Canis Lupus Familiaris	Yes	A
		*	Duck (USDA A)	Anas Platyrhynchos	No	A
		*	Fruit Fly (USDA C)	Drosophilia	Yes	C
		*	Goat (USDA A)	Capra Aegagrus Hircus	Yes	A
		*	Guinea Pig (USDA A)	Cavia Porcellus	Yes	A
		*	Mouse (USDA A)	Mus	Yes	A
		*	Rat (USDA A)	Rattus	Yes	A
		*	Syrian Hamster (USDA A)	Mesocricetus Auratus	Yes	A
		*	White Wing Dove (USDA A)	Zenaida Asiatica	Yes	A

In the screenshot above, **Category Type** was mistakenly set to “A” instead of “C” in the “American Crow (USDA C)” record.

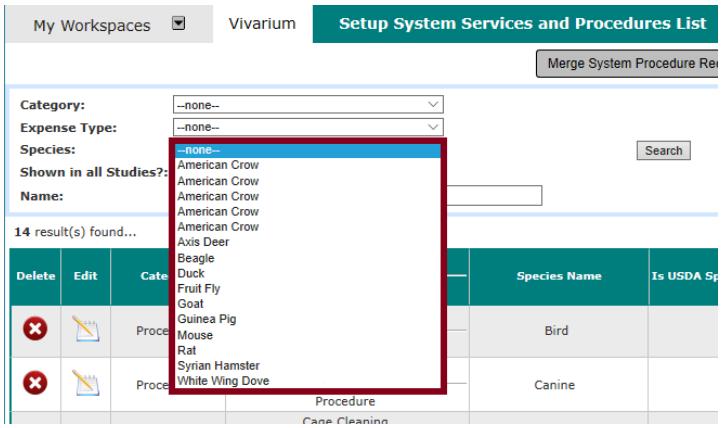
To edit a species record, click the icon in the **Edit** column for the applicable record. The record is opened in an **Edit a species in the system** panel.



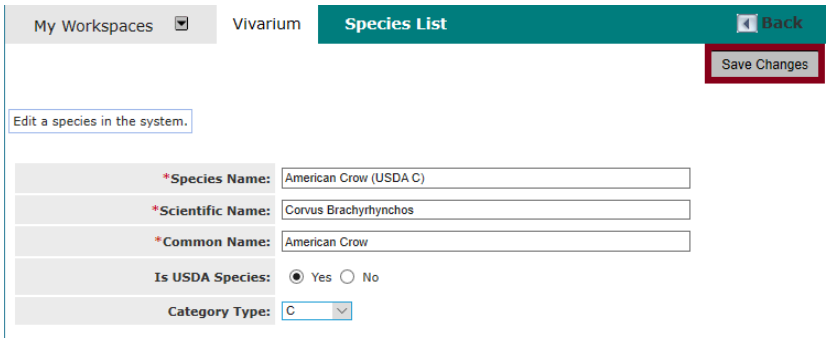
Because there can be multiple versions of the same species record, each with a different **Category Type** assigned, it’s a good practice to include the **Category Type** designation when entering or revising the **Species Name**. Doing so ensures that users will be able to distinguish between records in the species dropdown list wherever it appears in the iRIS™ system.



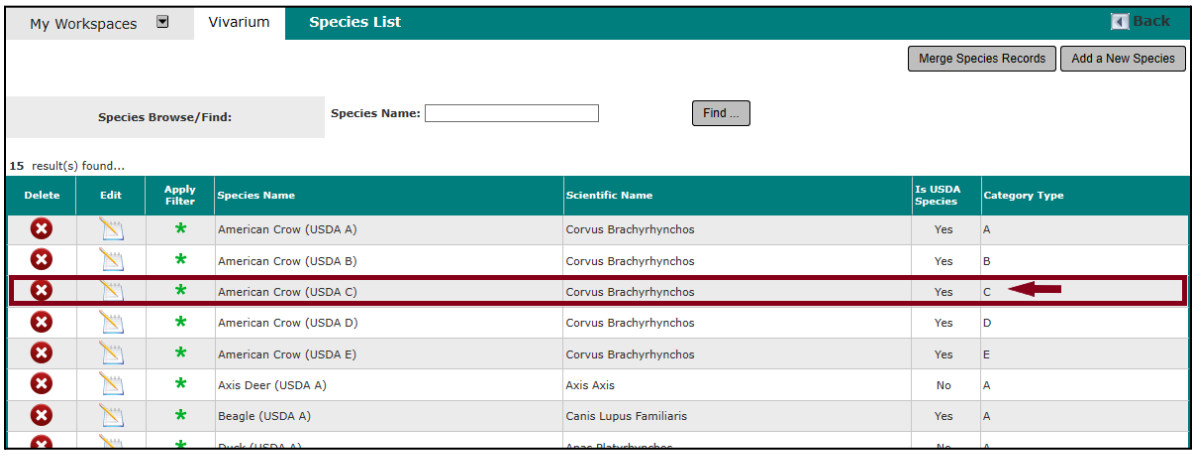
In the example above the **Category Type** is included in the **Species Name**. The example below demonstrates the difficulty in distinguishing between species records when the **Category Type** is *not* included in the **Species Name**.



Make desired changes in the edit panel and click the **Save Changes** button to save changes and return to the main **Species List** page.

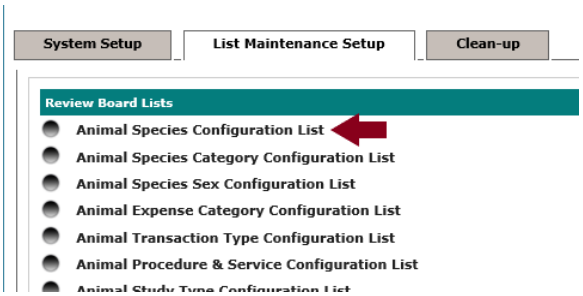


The record is revised in the **Species List**.

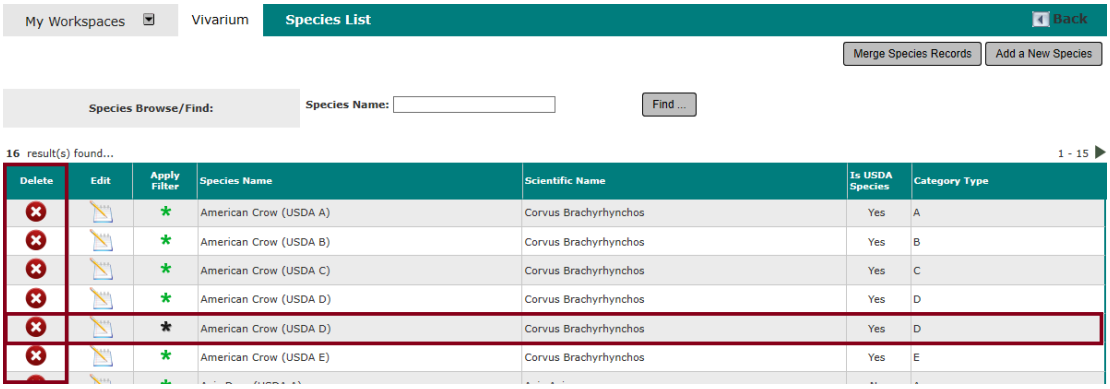


Delete Species

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Species Configuration List** link.

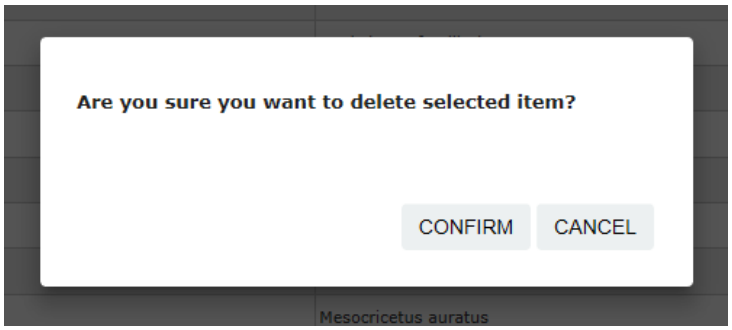


The **Species List** page is opened.



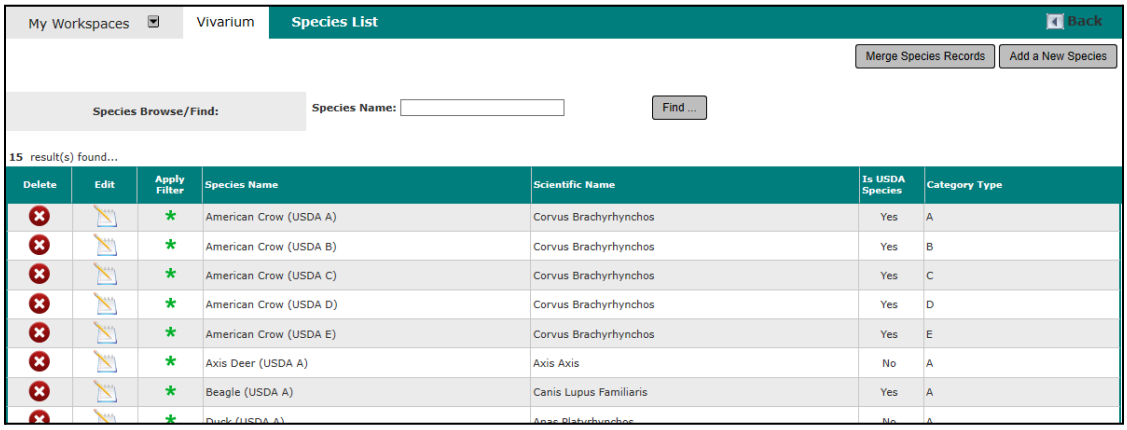
In the screenshot above, the fifth species record for “American Crow” is a duplicate that was created in error.

To delete a species record, click the icon in the **Delete** column for the applicable record. A confirmation popup window appears.

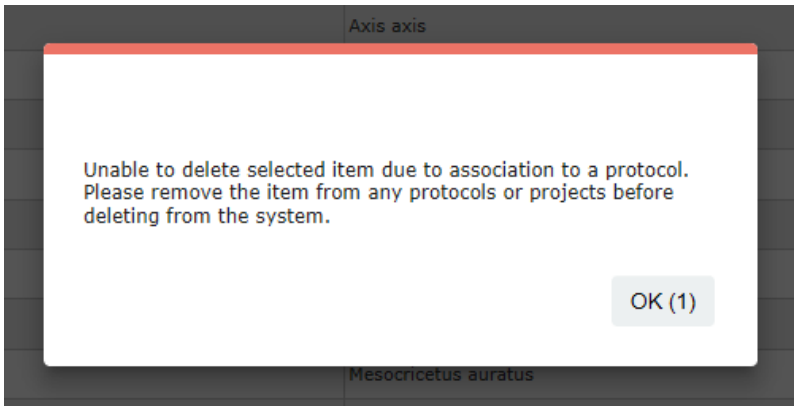


Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The record is deleted.



If the species being deleted has been assigned to any studies, a second popup appears after the first to notify the user the record cannot be deleted. The popup timer counts down from three (3) to one (1), and then the popup closes. The record is not deleted.

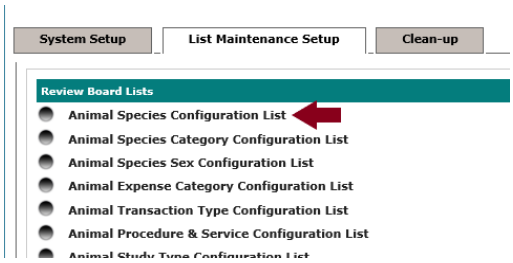


Merge Species

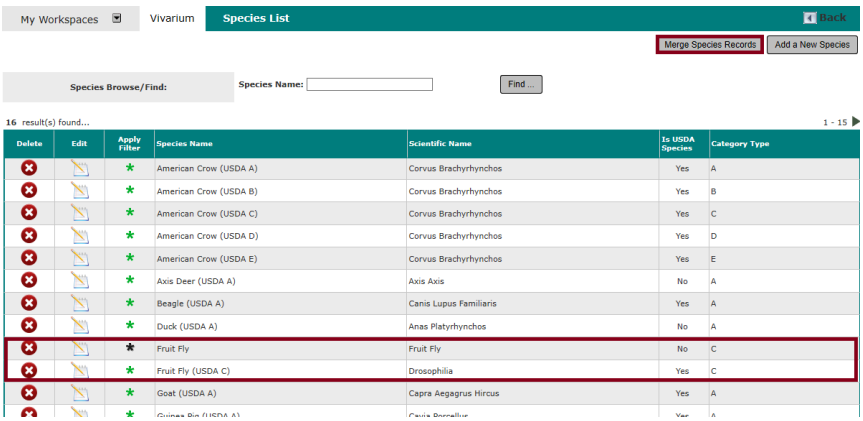
Recall that once a species has been assigned to a study application, it cannot be deleted. Sometimes a duplicate or erroneous species record is created and then assigned to one or more study applications before the mistake is caught.

In that situation, the duplicate or erroneous species record can be merged with a valid species record. The valid species record is then substituted for the duplicate/erroneous species record previously assigned to study applications.

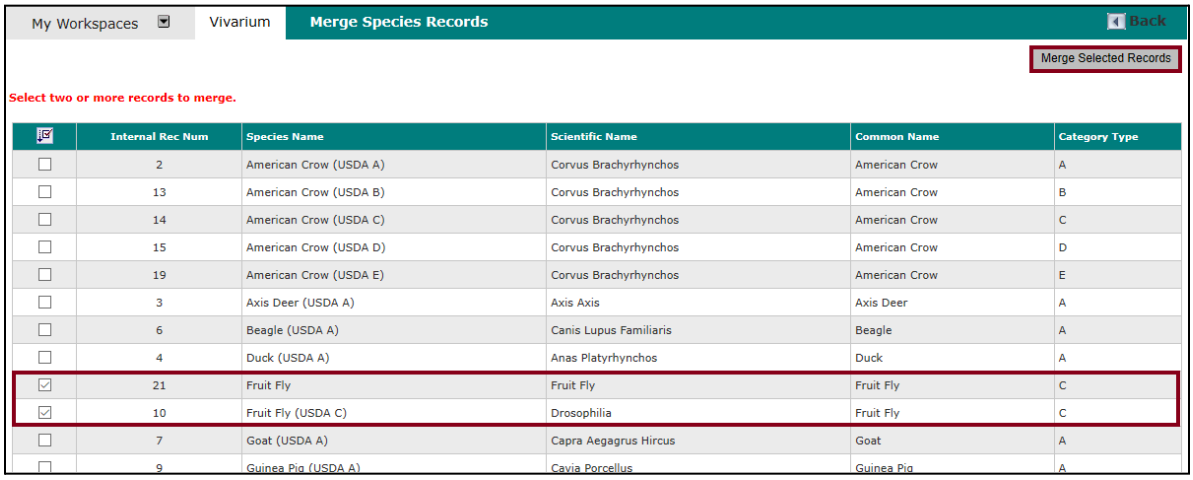
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Species Configuration List** link.



The **Species List** page is opened.



In the example shown above, the first Fruit Fly species record in the list was created in error but has been assigned to one or more studies. Click the **Merge Species Records** button to begin. The **Merge Species Records** page opens.



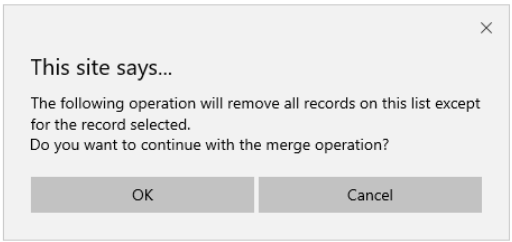
	Internal Rec Num	Species Name	Scientific Name	Common Name	Category Type
☐	2	American Crow (USDA A)	Corvus Brachyrhynchos	American Crow	A
☐	13	American Crow (USDA B)	Corvus Brachyrhynchos	American Crow	B
☐	14	American Crow (USDA C)	Corvus Brachyrhynchos	American Crow	C
☐	15	American Crow (USDA D)	Corvus Brachyrhynchos	American Crow	D
☐	19	American Crow (USDA E)	Corvus Brachyrhynchos	American Crow	E
☐	3	Axis Deer (USDA A)	Axis Axis	Axis Deer	A
☐	6	Beagle (USDA A)	Canis Lupus Familiaris	Beagle	A
☐	4	Duck (USDA A)	Anas Platyrhynchos	Duck	A
☑	21	Fruit Fly	Fruit Fly	Fruit Fly	C
☑	10	Fruit Fly (USDA C)	Drosophilia	Fruit Fly	C
☐	7	Goat (USDA A)	Capra Aegagrus Hircus	Goat	A
☐	9	Guinea Pig (USDA A)	Cavia Porcellus	Guinea Pig	A

Select the checkboxes at far left for the species records to be merged and click the **Merge Selected Records** button. A new panel opens with only the selected records listed.

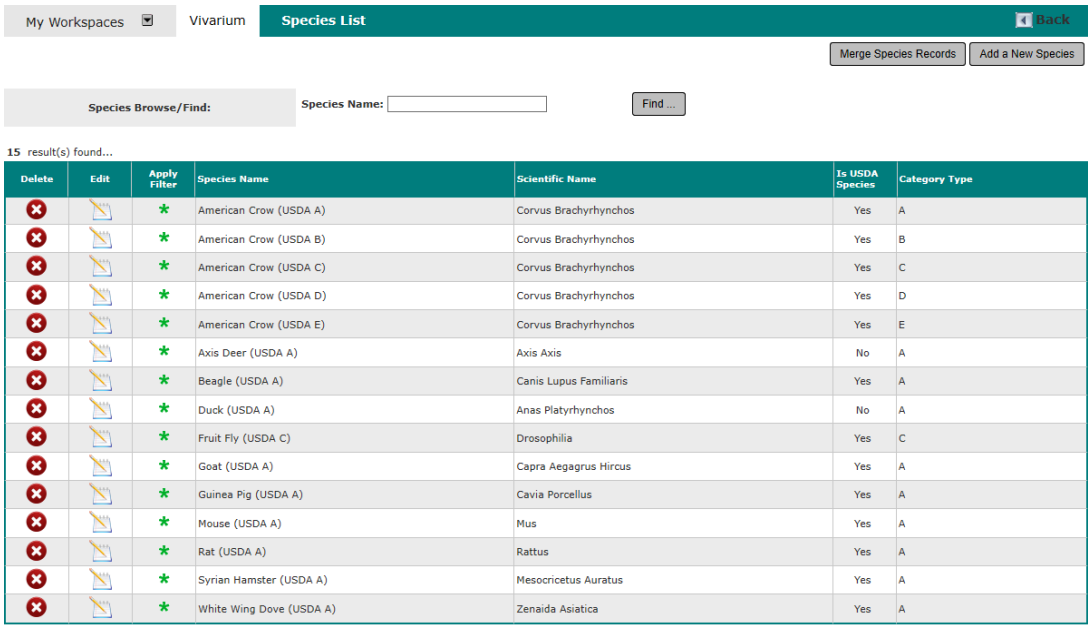
	Species Name	Scientific Name	Common Name	Category Type
◉	Fruit Fly (USDA C)	Drosophilia	Fruit Fly	C
○	Fruit Fly	Fruit Fly	Fruit Fly	C

Click the **Cancel** button to close the panel without merging the records.

Note the red instruction text above the table: select the radio button at far left for the record to be KEPT, then click the **Merge** button. A confirmation popup window appears.



As the popup states, all species records in the list on the **Merge Species Records** page will be deleted except for the selected record. Click **Cancel** to close the popup without merging the records. Click **OK** to complete the merge and return to the **Species List** page. As shown below, the Fruit Fly records are merged.



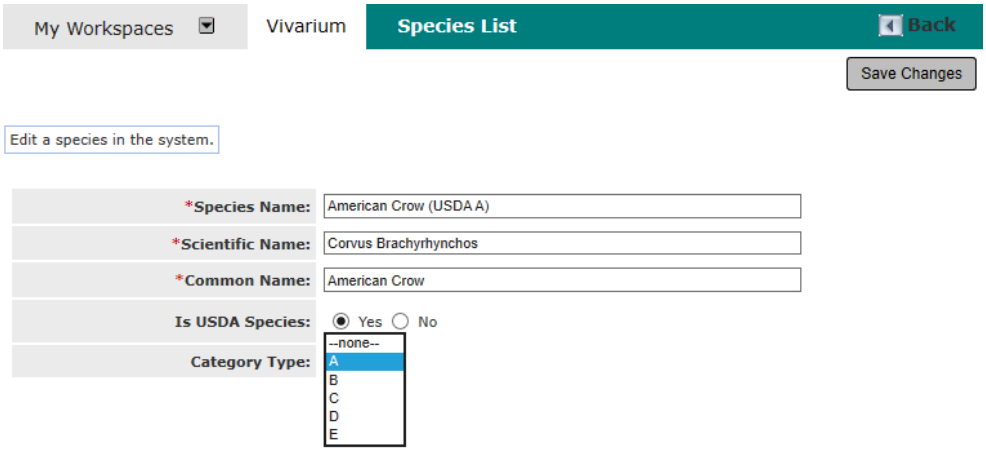
Delete	Edit	Apply Filter	Species Name	Scientific Name	Is USDA Species	Category Type
		*	American Crow (USDA A)	Corvus Brachyrhynchos	Yes	A
		*	American Crow (USDA B)	Corvus Brachyrhynchos	Yes	B
		*	American Crow (USDA C)	Corvus Brachyrhynchos	Yes	C
		*	American Crow (USDA D)	Corvus Brachyrhynchos	Yes	D
		*	American Crow (USDA E)	Corvus Brachyrhynchos	Yes	E
		*	Axis Deer (USDA A)	Axis Axis	No	A
		*	Beagle (USDA A)	Canis Lupus Familiaris	Yes	A
		*	Duck (USDA A)	Anas Platyrhynchos	No	A
		*	Fruit Fly (USDA C)	Drosophilia	Yes	C
		*	Goat (USDA A)	Capra Aegagrus Hircus	Yes	A
		*	Guinea Pig (USDA A)	Cavia Porcellus	Yes	A
		*	Mouse (USDA A)	Mus	Yes	A
		*	Rat (USDA A)	Rattus	Yes	A
		*	Syrian Hamster (USDA A)	Mesocricetus Auratus	Yes	A
		*	White Wing Dove (USDA A)	Zenaida Asiatica	Yes	A

Animal Species Category Configuration List

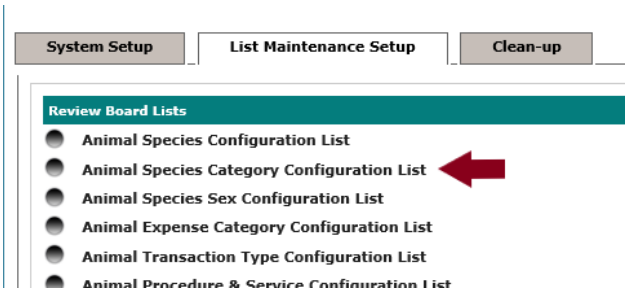
As discussed in the USDA Pain and Distress Categories section of this manual, applications for studies involving animal subjects must report the anticipated level of animal subject pain or distress according to the USDA's standardized designations, which are labeled "A" through "E".

See the USDA Pain and Distress Categories section of this manual for details of each USDA designation.

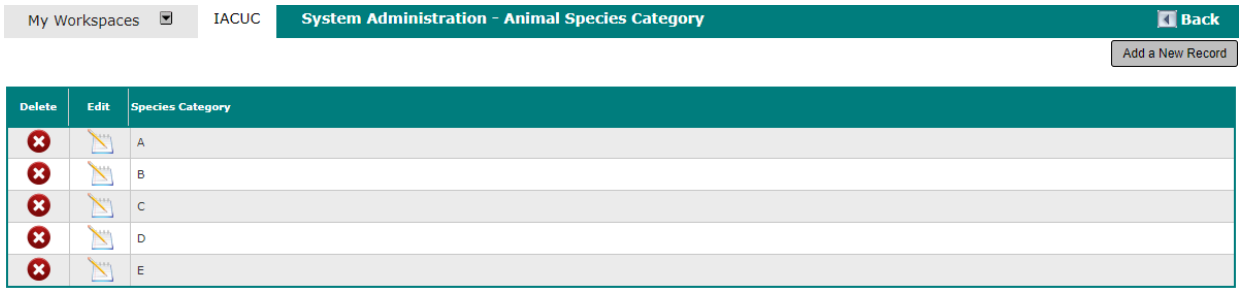
In the iRIS™ system, USDA designations are maintained in an Animal Species Category list. The Animal Species Category list populates the USDA Pain and Distress **Category Type** dropdown list for animal species records, as shown below.



To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Species Category Configuration List** link.



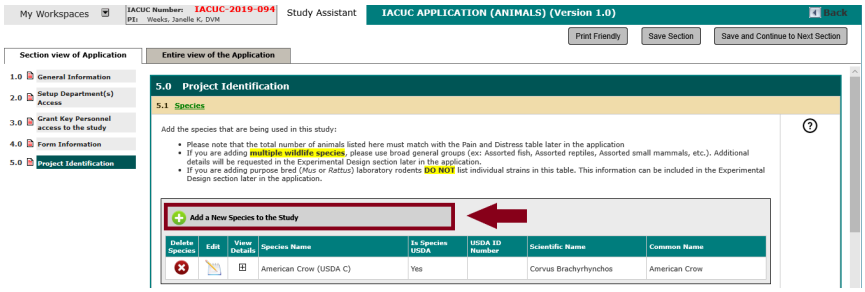
The **Animal Species Category** page is opened.

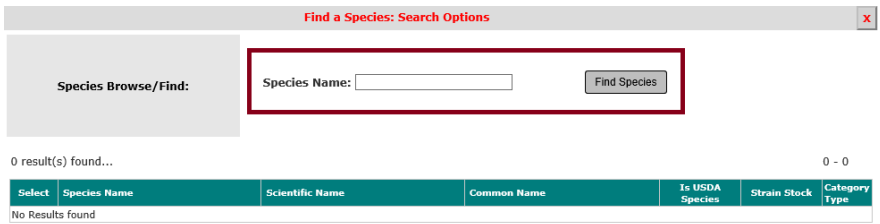


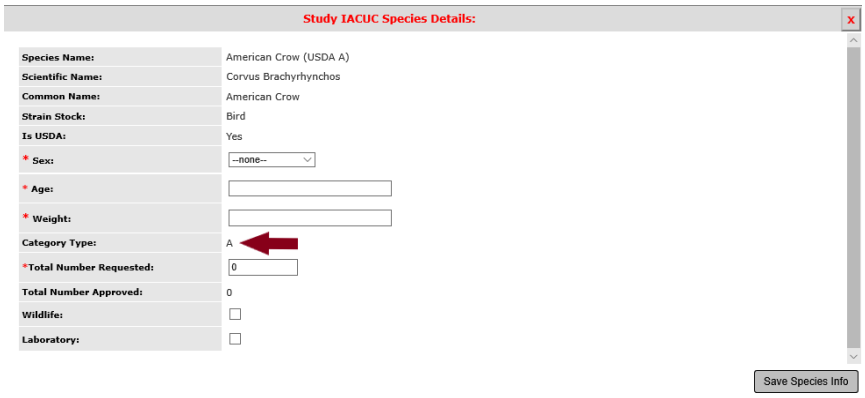
Species Category Implementation – Application Side

The species category list is employed in the following areas on the application side of iRIS™.

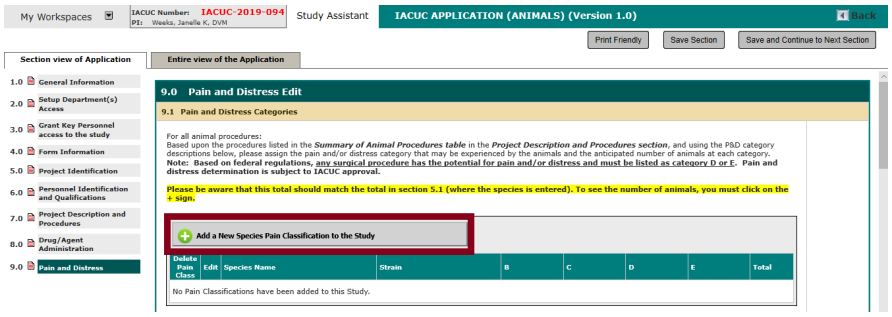
IACUC / ARC Study Application — in the **Project Identification** section, when the user clicks the **Add A New Species to the Study** button, popup dialogs are provided for species selection; species category is tied to each species record, so selection of a species also selects a corresponding species category

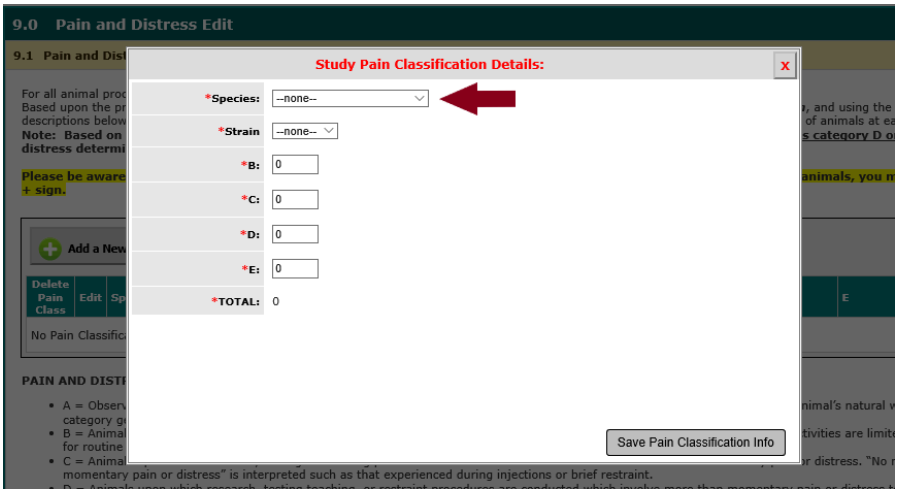






IACUC / ARC Study Application — an **Add a New species Pain Classification to the Study** button is provided in the **Pain and Distress** section of the application; clicking the button opens a popup for entry of **Study Pain Classification Details**, which includes a **Species** field





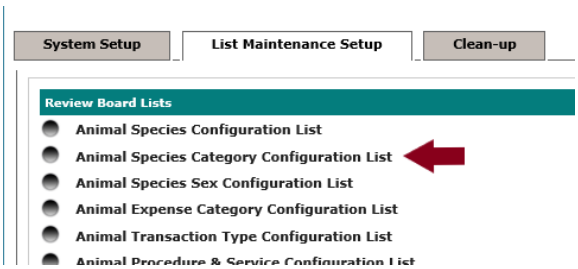
For more information about the IACUC study application, see the iRIS™ IACUC Assistant - IACUC Assistant Manual.

Species Category Implementation – Board Side

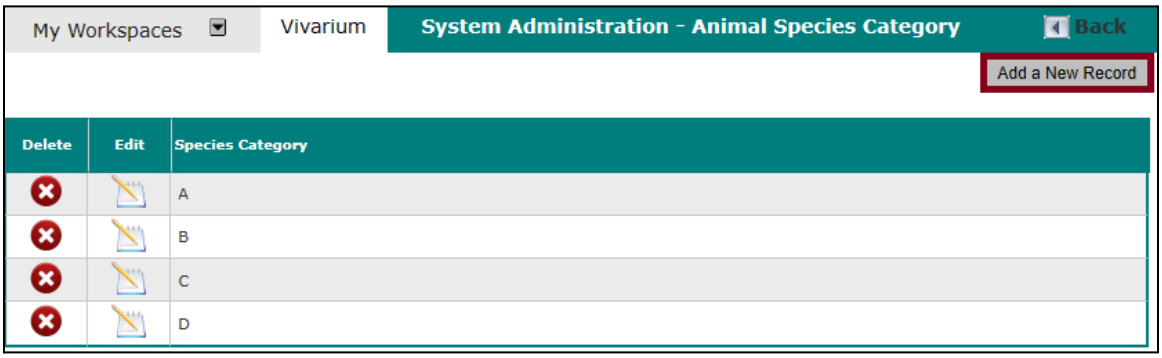
Species category(ies) is(are) designated on the application side where required and are not generally subject to direct revision by the board.

Add Species Category

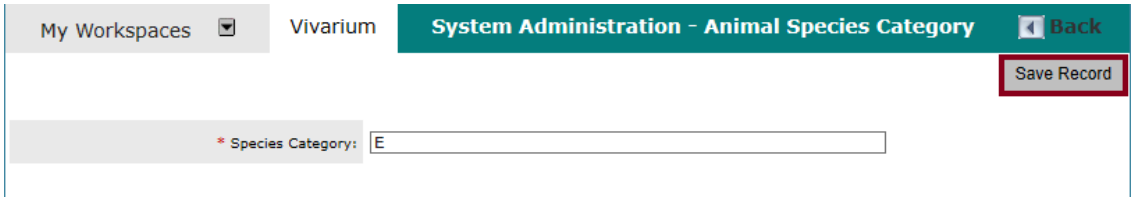
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Species Category Configuration List** link.



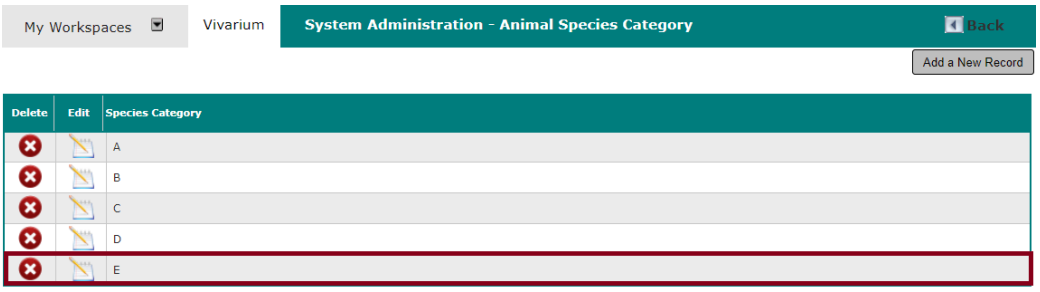
The **System Administration – Animal Species Category** page is opened.



In the example above, four of the five USDA designations have been created. Click the **Add a New Record** button. A panel opens for creation of the record.



Enter the desired **Species Category** designation, then click the **Save Record** button to save the new record and return to the **Animal Species Category** list page. The new record is added.

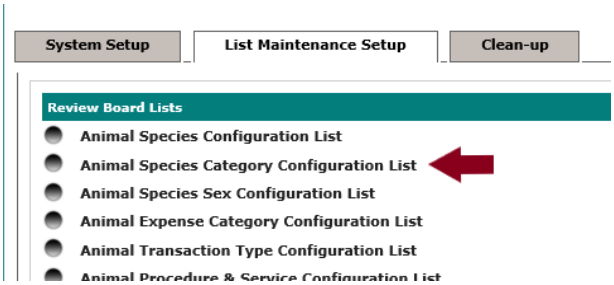


Some institutions may wish to use the **Animal Species Category** list for purposes other than, or in addition to, tracking USDA Pain and Distress designations.

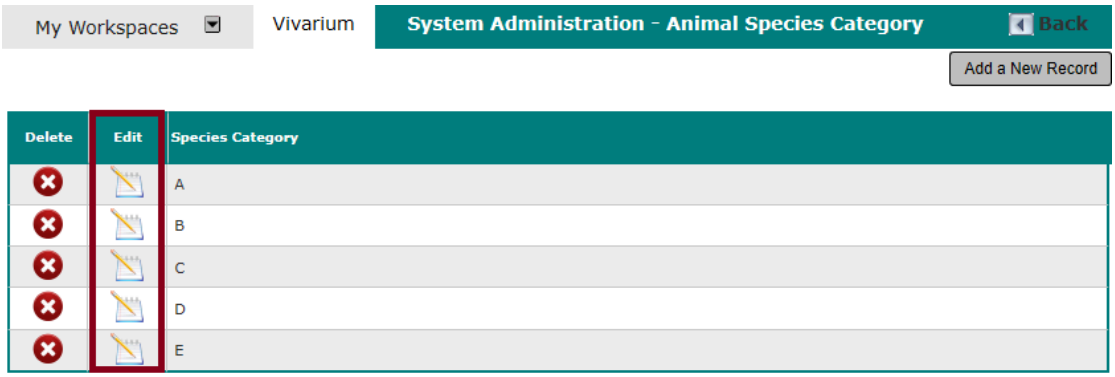
*To deliver maximum flexibility, the iRIS™ system does not limit the number of Animal Species Category records to five and does not prevent creation of duplicate category records. It is the responsibility of the iRIS™ system administrator to ensure the **Animal Species Category** list is maintained in accordance with the institution's requirements.*

Edit Species Category

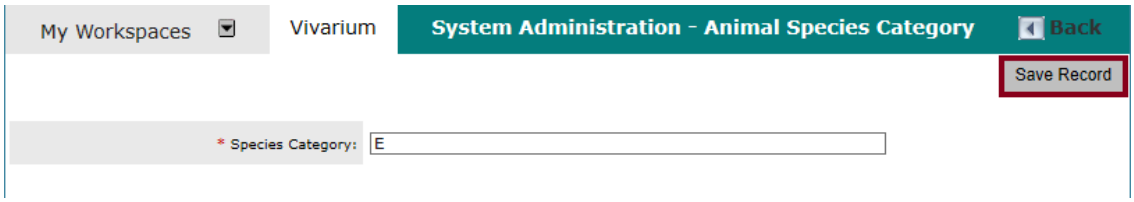
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Species Category Configuration List** link.



The **System Administration – Animal Species Category** page is opened.



Click the icon in the **Edit** column for the applicable record. A panel opens for editing the record.

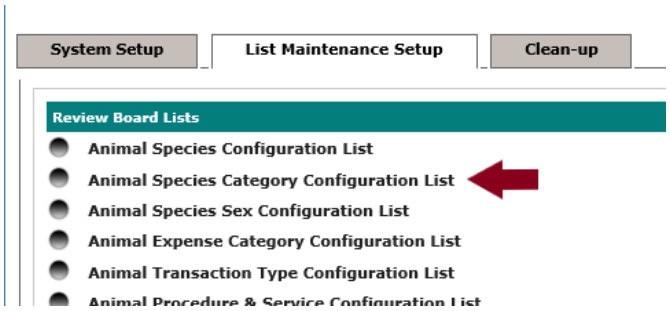


To deliver maximum flexibility, the iRIS™ system does not limit the number of Animal Species Category records to five and does not prevent creation of duplicate category records. It is the responsibility of the iRIS™ system administrator to ensure the ***Animal Species Category*** *list is maintained in accordance with the institution's requirements.*

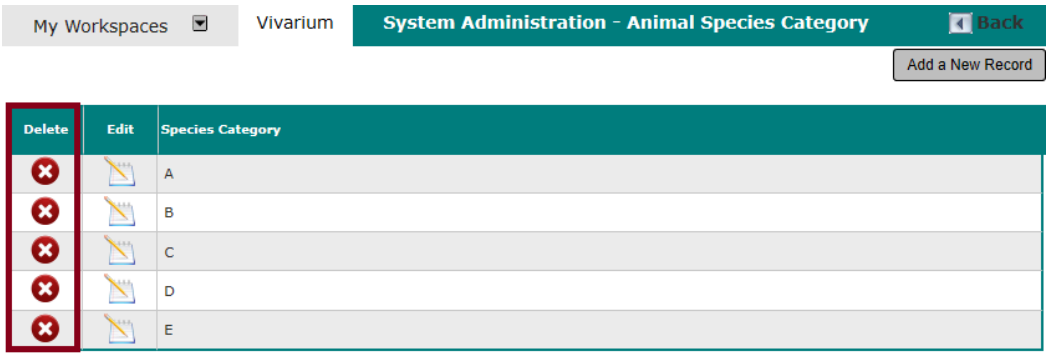
Make desired edits, then click the **Save Record** button to save changes and return to the **Animal Species Category** list page.

Delete Species Category

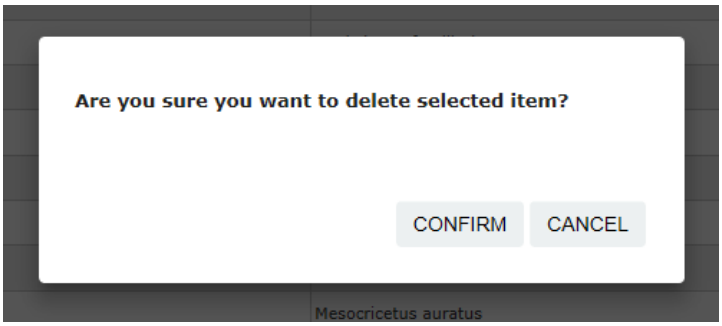
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Species Category Configuration List** link.



The **System Administration – Animal Species Category** page is opened.



Click the icon in the **Delete** column for the record to be deleted. A confirmation popup window appears.



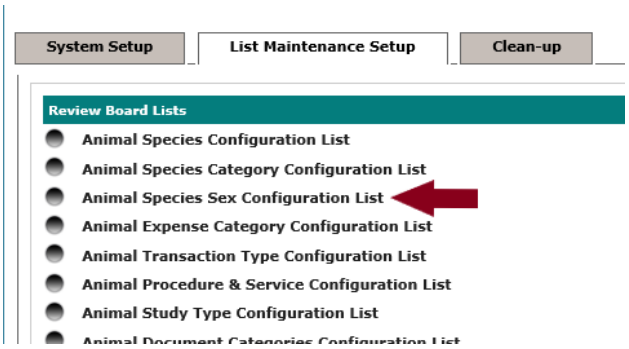
Note that deleting a species category that is already in use on study applications will delete the assigned species category from those applications. It is the responsibility of the iRIS™ system administrator to ensure the applicable species category is not in use before deleting it.

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

Click **CONFIRM** to delete the record and return to the **Animal Species Category** list page.

Animal Species Sex Configuration List

The sex of each study animal, or group of study animals, is assigned in the iRIS™ system via selection from the **Animal Species Sex** configuration list. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Species Sex Configuration List** link.

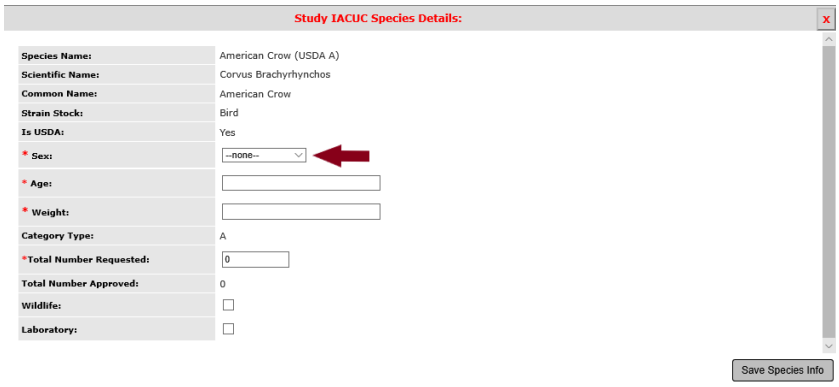


The **Animal Species Sex** page is opened.

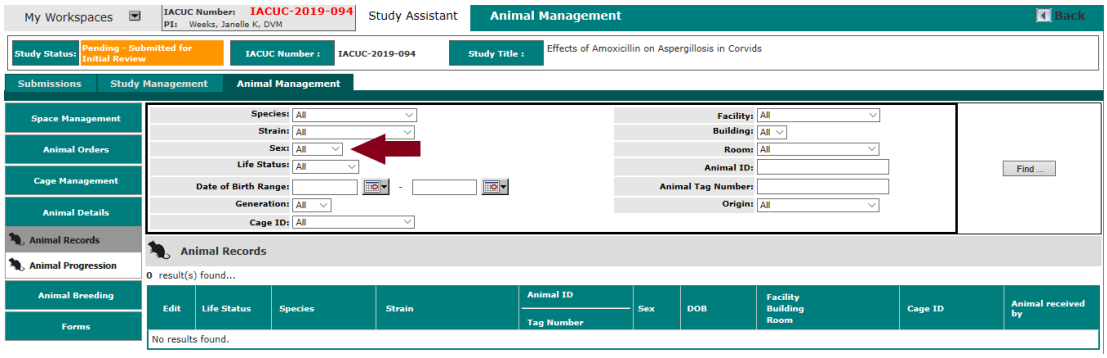
Animal Species Sex List Implementation – Application Side

The species sex list is employed in the following areas on the application side of iRIS™.

Submissions — the animal species sex list is included in the **Study IACUC Species Details** popup that displays when an animal order is created via the Animal Orders section of the Animal Management tab when reviewing a submission



Submissions — the animal species sex list is employed in the search form provided in the **Animal Records** section of the **Animal Management** tab when reviewing a submission



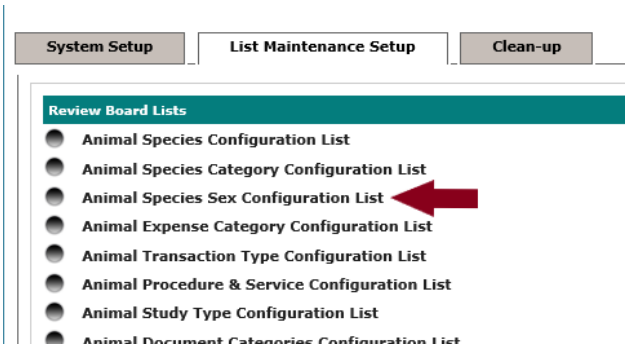
For more information about the IACUC study application, see the iRIS™ IACUC Assistant - IACUC Assistant Manual.

Animal Species Sex List Implementation – Board Side

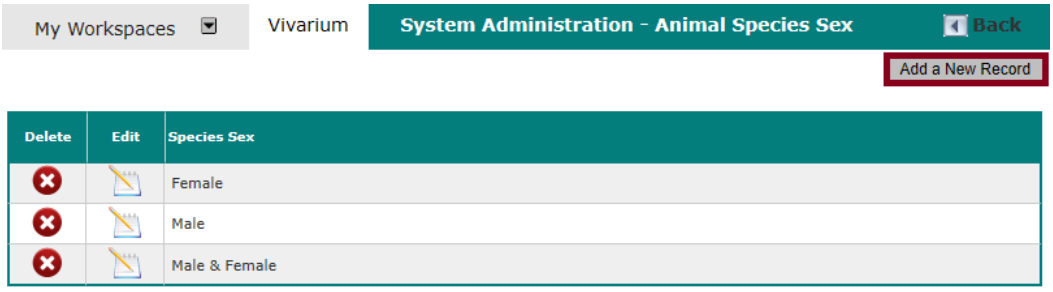
Animal species sex selections are designated on the application side where required and are not generally subject to direct revision by the board.

Add Species Sex

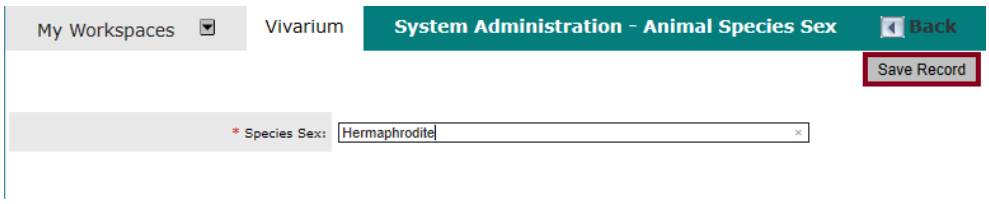
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Species Sex Configuration List** link.



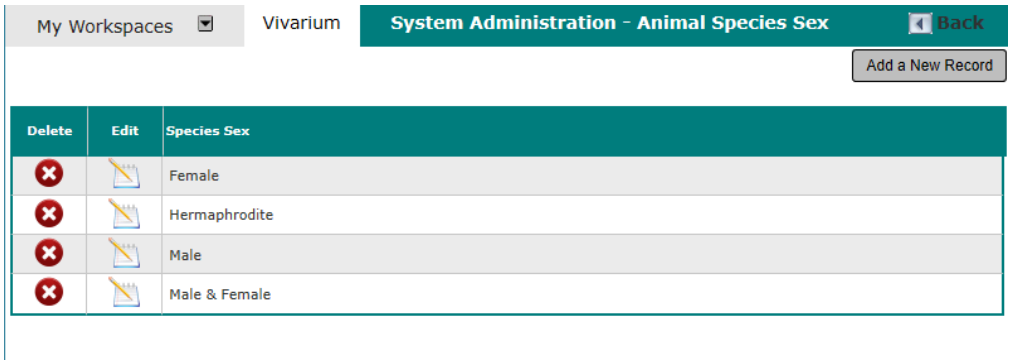
The **System Administration – Animal Species Sex** page is opened.



Click the **Add a New Record** button. A panel opens for creation of the record.



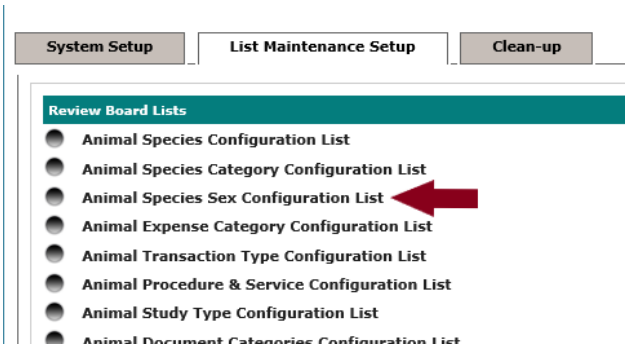
Enter the desired **Species Sex** designation, then click the **Save Record** button to save the new record and return to the **Animal Species Sex** list page. The new record is added.



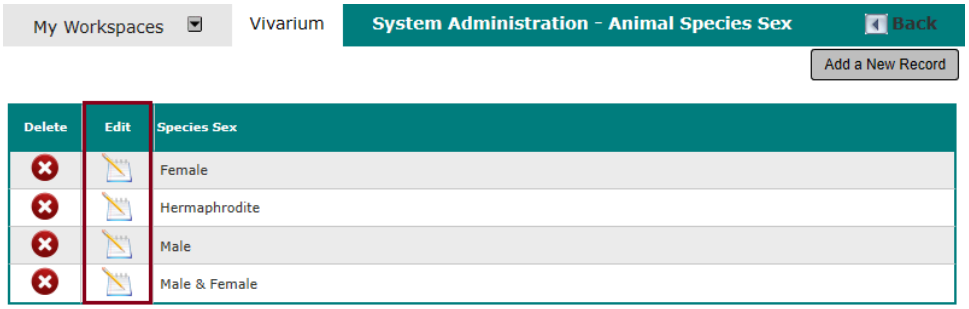
Note that in this list the sex designation of "Male & Female" refers to a mixed-sex population of animals, while a sex designation of "Hermaphrodite" refers to animals that are true hermaphrodites (e.g., snails).

Edit Species Sex

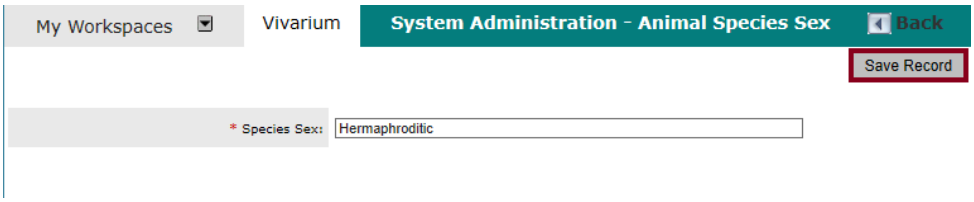
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Species Sex Configuration List** link.



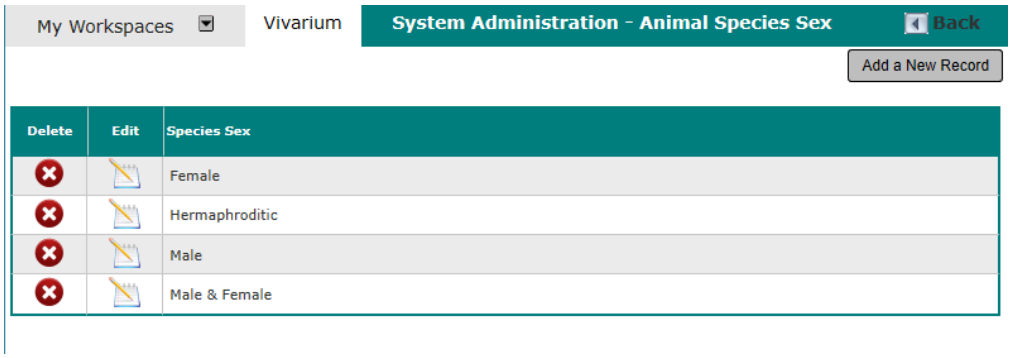
The **System Administration – Animal Species Sex** page is opened.



Click the icon in the **Edit** column for the applicable record. A panel opens for editing the record.



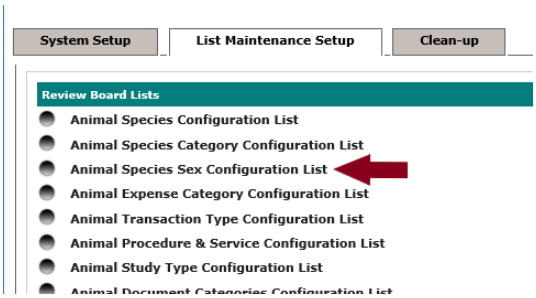
Make desired edits, then click the **Save Record** button to save the changes and return to the **Animal Species Sex** list page. The record is revised.



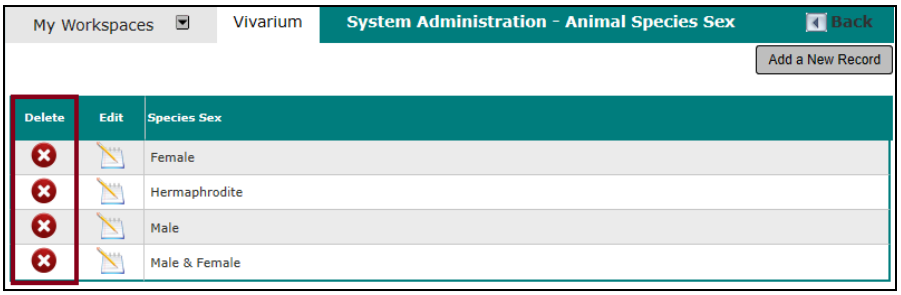
Note that in this list the sex designation of "Male & Female" refers to a mixed-sex population of animals, while a sex designation of "Hermaphroditic" refers to animals that are true hermaphrodites (e.g., snails).

Delete Species Sex

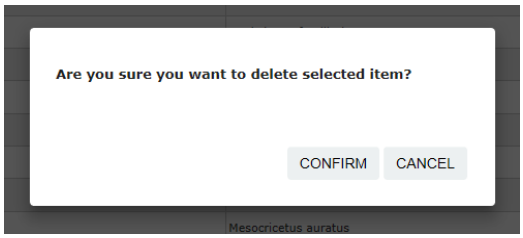
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Species Sex Configuration List** link.



The **System Administration – Animal Species Sex** page is opened.



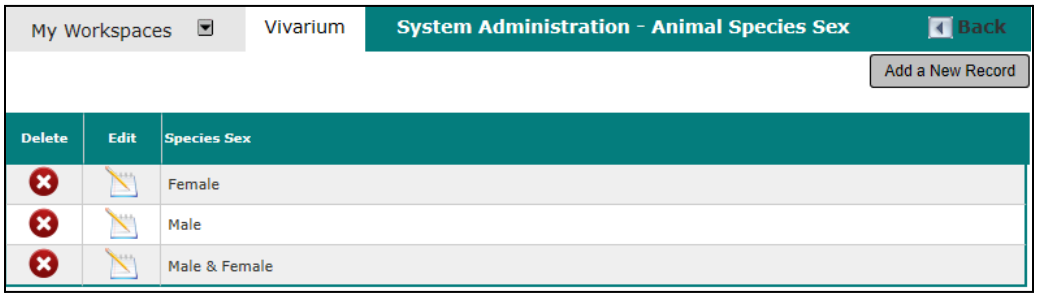
Click the icon in the **Delete** column for the record to be deleted. In this case, the "Hermaphrodite" record is being deleted. A confirmation popup window appears.



Note that deleting a species sex that is already in use on study applications will delete the assigned species sex from those applications. It is the responsibility of the iRIS™ system administrator to ensure the applicable species sex is not in use before deleting it.

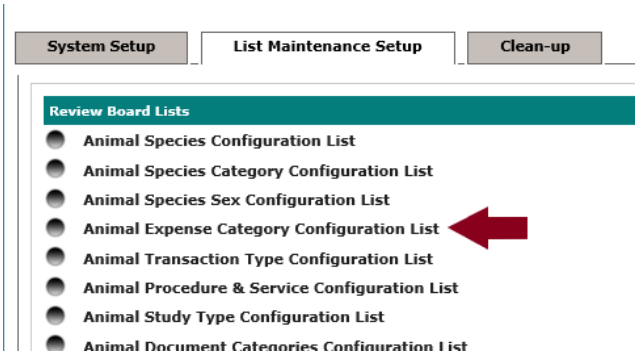
Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to delete the record and return to the **Animal Species Sex** list page. The record is deleted.

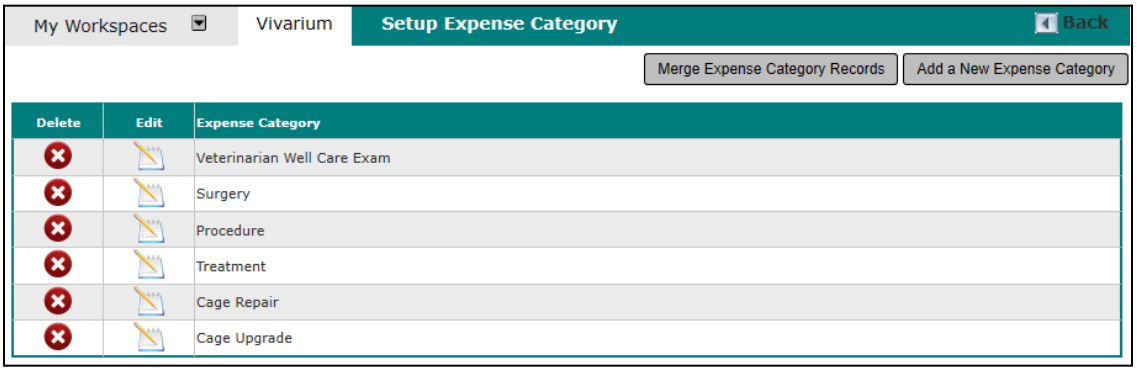


Animal Expense Category Configuration List

The animal expense category configuration list is used to populate a dropdown picklist of expense categories involved in animal subject research. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Expense Category Configuration List** link.



The **Setup Expense Category** page is opened.



Animal Expense Category Implementation – Application Side

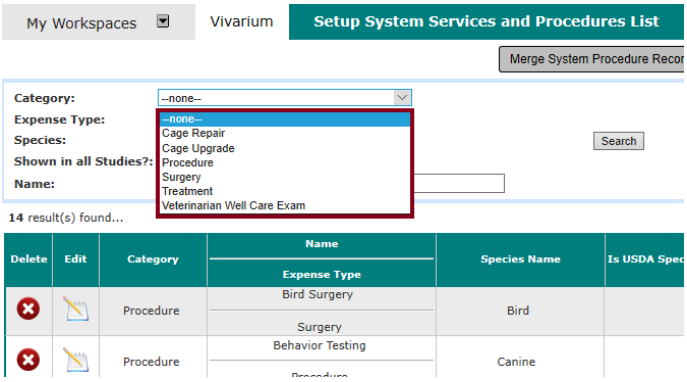
Animal expenses incurred on the application side of iRIS™ are processed in the accounting areas of the ARC module.

Please see the Animal Resource Center — Orders and Billing manual and the Animal Resource Center — Order Processing manual for more information about ARC accounting functions.

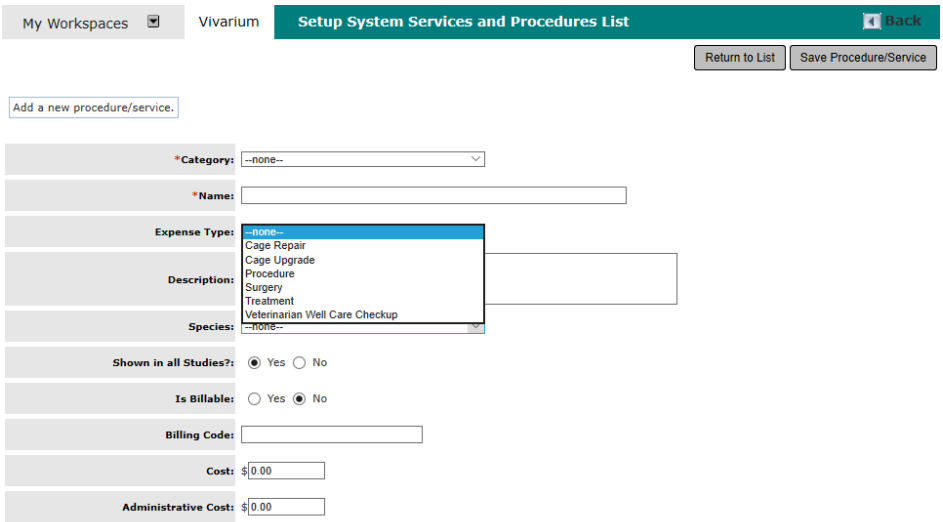
Animal Expense Category Implementation – Board Side

The animal expense category list is employed in the following areas on the review board / system setup side of iRIS™.

Setup System Service and Procedures List page — the animal expense category list is employed in the **Setup System Service and Procedures List** page, which is accessed via Animal Resource Center > Review Board Administration > List Maintenance Setup tab > **Animal Procedure & Service Configuration List** link

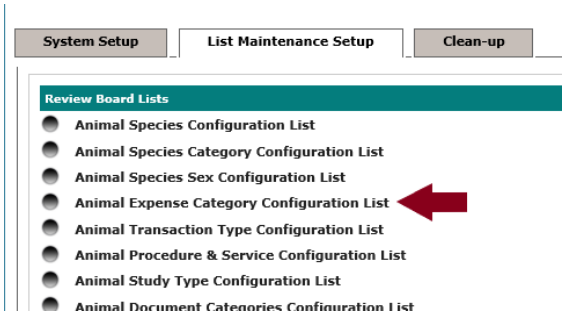


Setup System Service and Procedures List add panel — the animal expense category list is employed in the **Setup System Service and Procedures List** add panel, which is accessed via Animal Resource Center > Review Board Administration > List Maintenance Setup tab > Animal Procedure & Service Configuration List link > Add a New Procedure/Service button

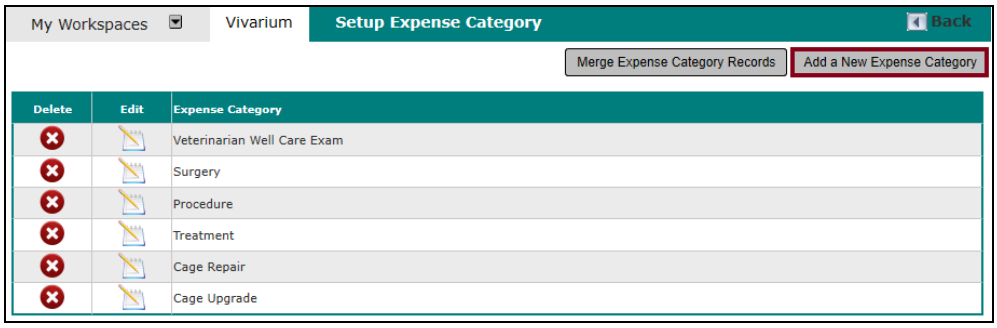


Add Animal Expense Category

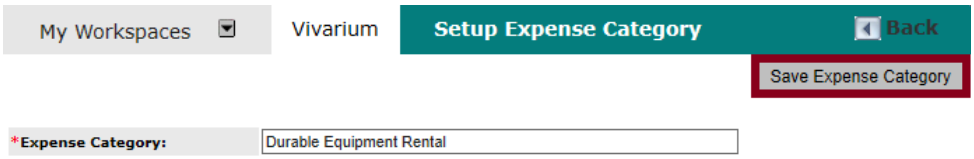
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Expense Category Configuration List** link.



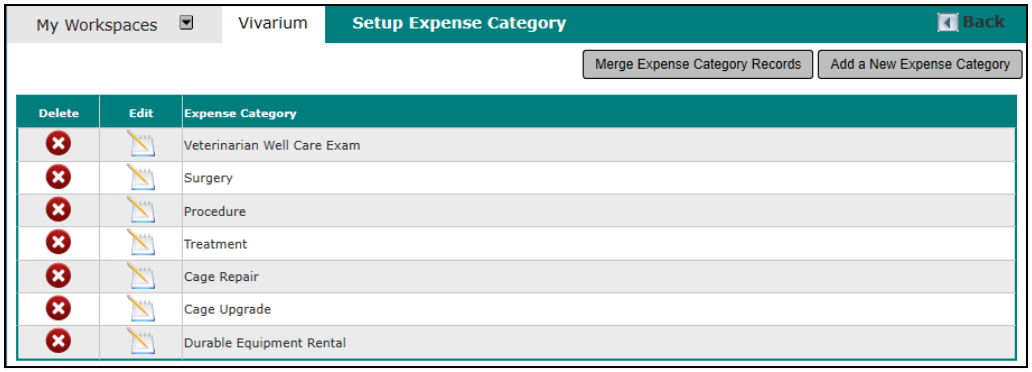
The **Setup Expense Category** page is opened.



Click the **Add a New Expense Category** button. A panel is opened for entry of a new record.

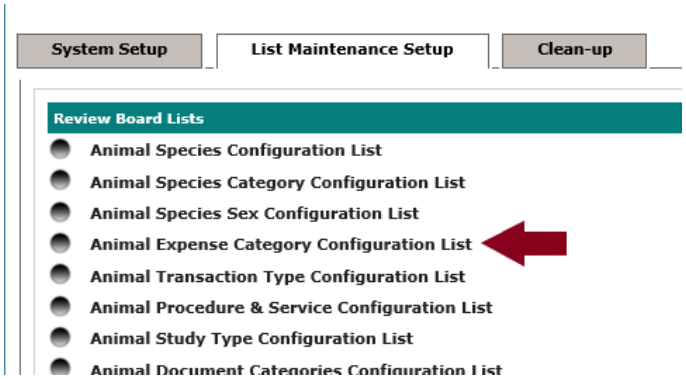


Enter the new **Expense Category** and click the **Save Expense Category** button to save the new record and return to the main **Setup Expense Category** list page. The new record is added to the list.

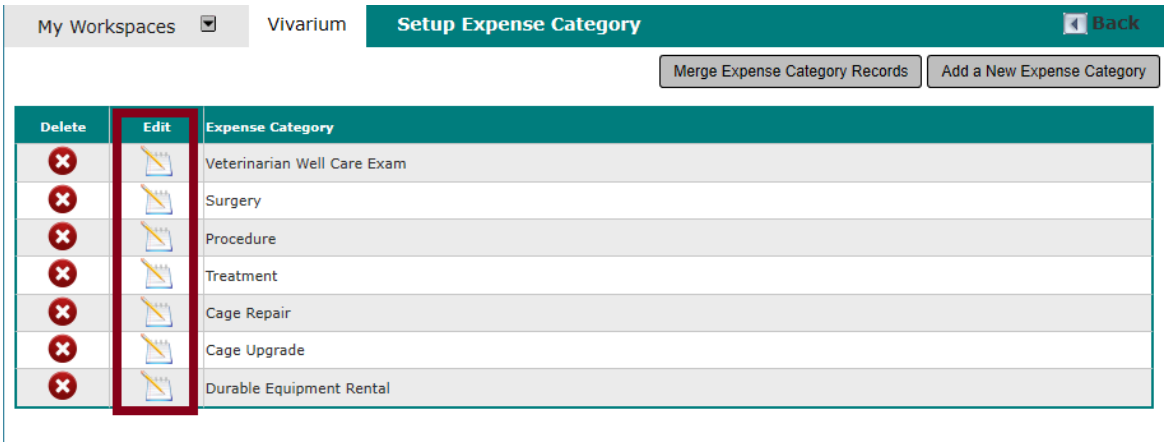


Edit Animal Expense Category

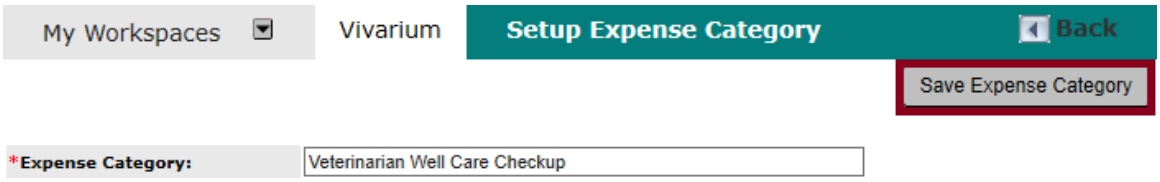
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Expense Category Configuration List** link.



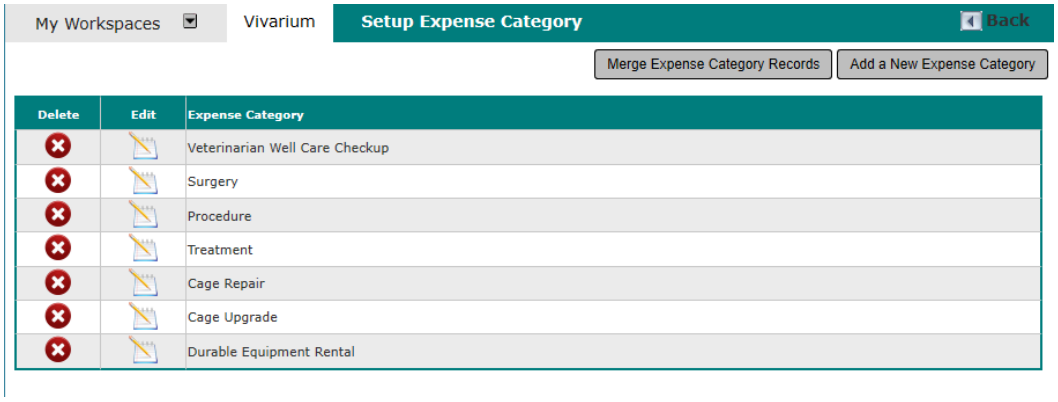
The **Setup Expense Category** page is opened.



Click the icon in the **Edit** column for the applicable record. A panel is opened for editing the record.

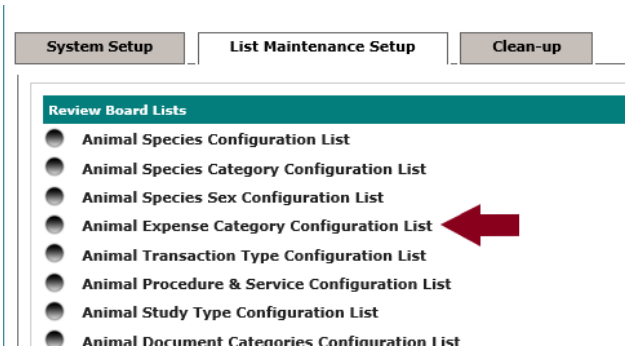


Make desired revisions, then click the **Save Expense Category** button to save changes and return to the main **Setup Expense Category** list page. The record is revised.

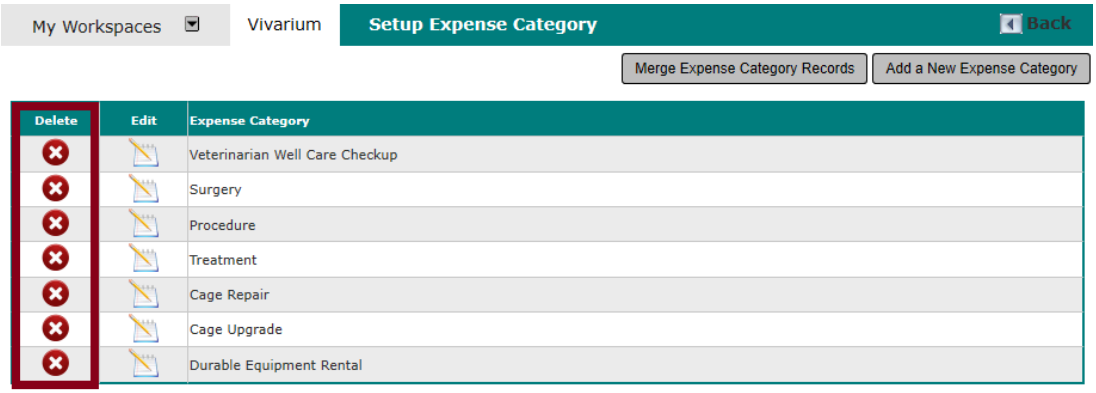


Delete Animal Expense Category

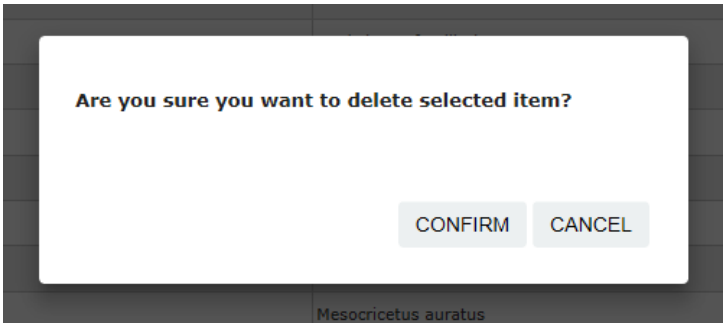
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Expense Category Configuration List** link.



The **Setup Expense Category** page is opened.



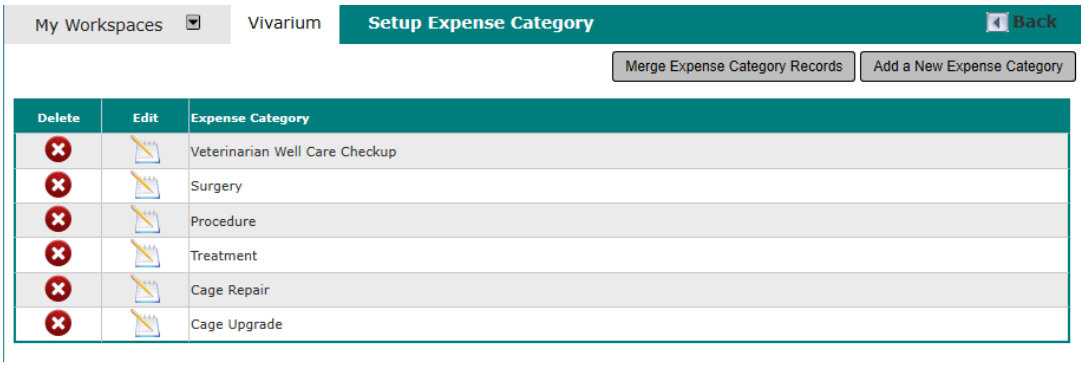
Click the icon in the **Delete** column for the record to be deleted. In this example the "Durable Equipment Rental" record is being deleted. A confirmation popup window appears.



Note that deleting an animal expense category that is already in use on study applications will delete the expense category from those applications. It is the responsibility of the iRIS™ system administrator to ensure the applicable expense category is not in use before deleting it.

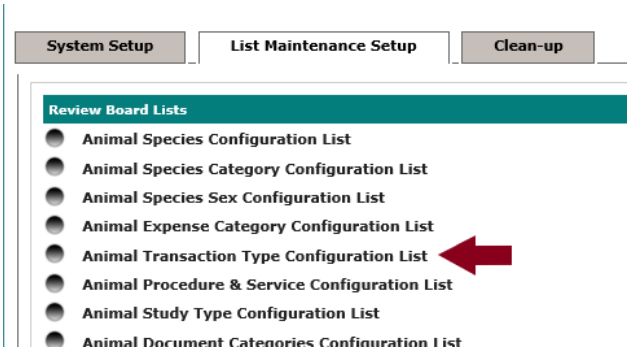
Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The record is deleted.

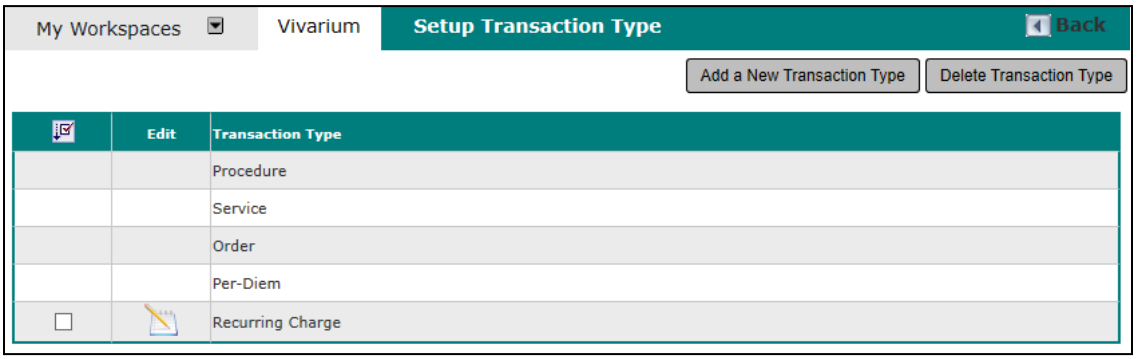


Animal Transaction Type Configuration List

The animal transaction type configuration list is used to populate a dropdown picklist of transaction types that can generate charges to be invoiced. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Transaction Type Configuration List** link.



The **Setup Transaction Type** page is opened.



Note that four **Transaction Type**s are provided by default: Procedure, Service, Order and Per-Diem. These records cannot be edited or deleted.

The institution can add its own **Transaction Type**s to the list to meet internal accounting needs. In the screenshot above, a “Recurring Charge” **Transaction Type** has been added. **Transaction Type**s added by the institution can be edited and deleted.

Animal Transaction Type Implementation – Application Side

Animal transactions initiated on the application side of iRIS™ are processed in the accounting areas of the ARC module.

Please see the Animal Resource Center — Orders and Billing manual and the Animal Resource Center — Order Processing manual for more information about ARC accounting functions.

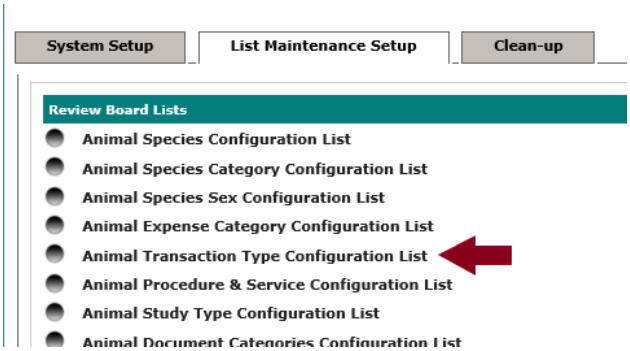
Animal Transaction Type Implementation – Board Side

Animal transactions initiated on the application side of iRIS™ are processed in the accounting areas of the ARC module and are not generally subject to direct revision by the board.

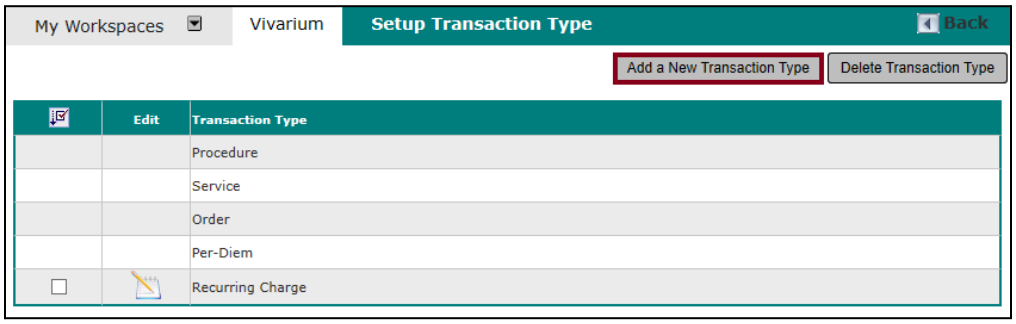
Please see the Animal Resource Center — Orders and Billing manual and the Animal Resource Center — Order Processing manual for more information about ARC accounting functions.

Add Animal Transaction Type

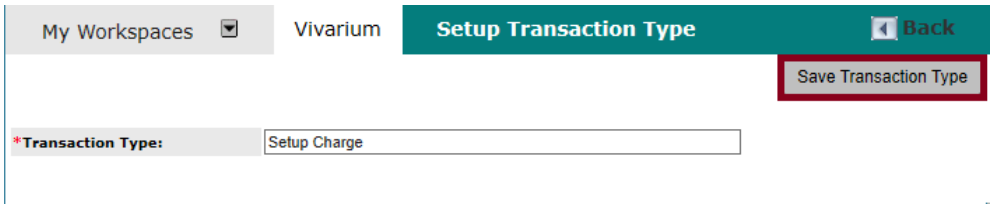
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Transaction Type Configuration List** link.



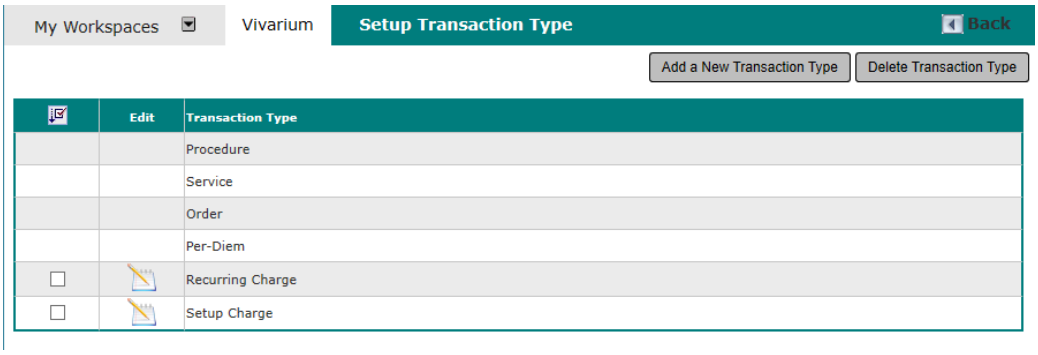
The **Setup Transaction Type** page is opened.



Click the **Add a New Transaction Type** button. A panel is opened for entry of a new record.

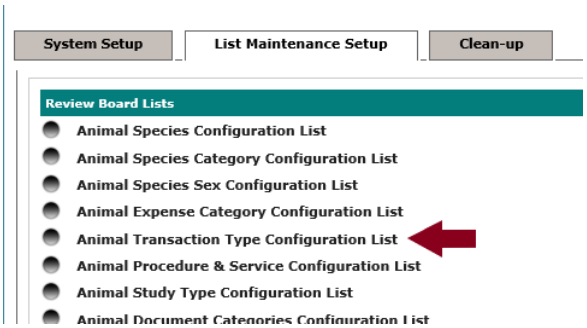


Enter the new **Transaction Type** and click the **Save Transaction Type** button to save the new record and return to the main **Setup Transaction Type** list page. The new record is added to the list.

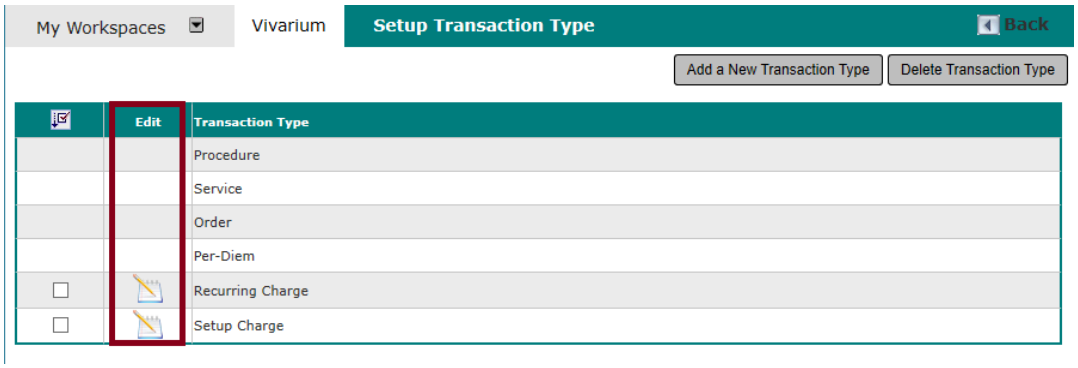


Edit Animal Transaction Type

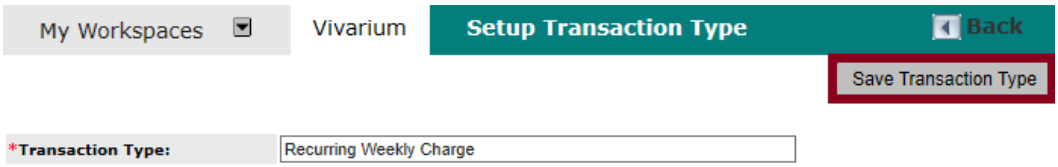
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Transaction Type Configuration List** link.



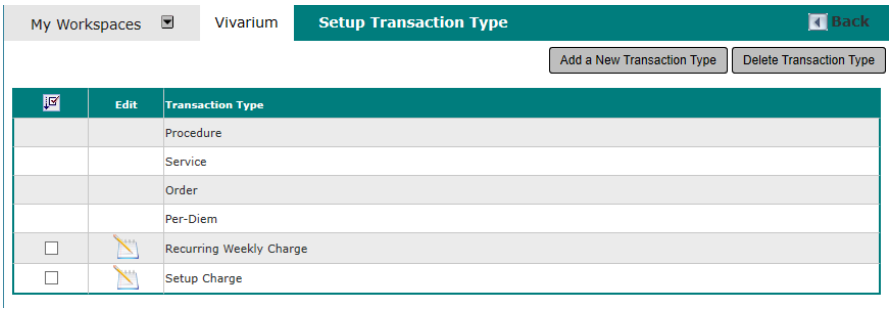
The **Setup Transaction Type** page is opened.



Click the icon in the **Edit** column for the applicable record. A panel is opened for editing the record.

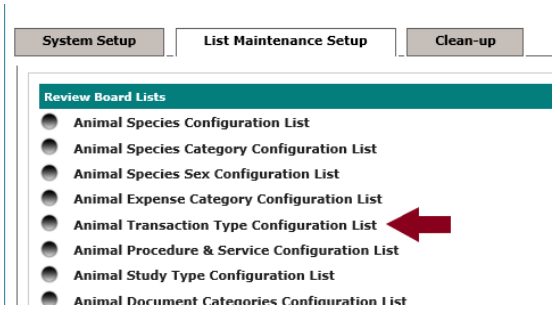


Enter the new **Transaction Type** and click the **Save Transaction Type** button to save changes and return to the main **Setup Transaction Type** list page. As shown below, the list item is revised.

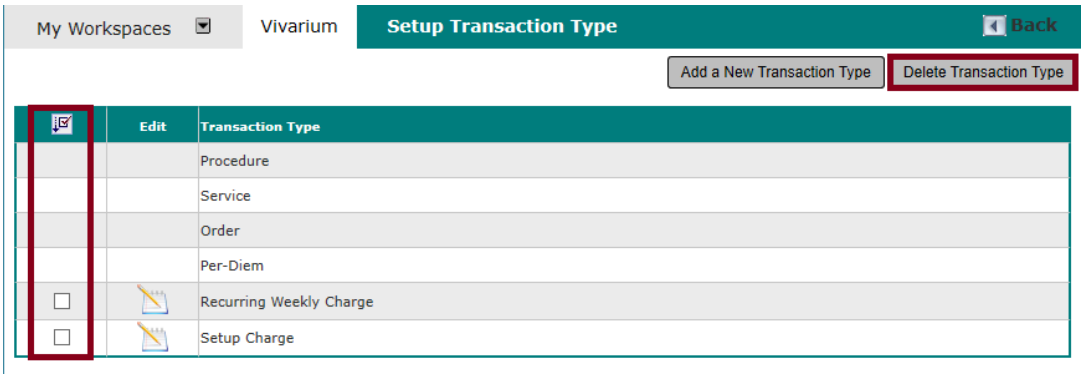


Delete Animal Transaction Type

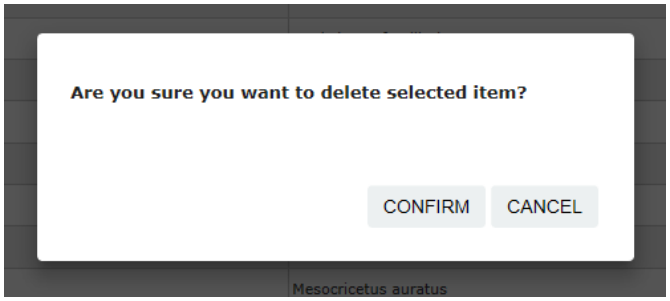
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Transaction Type Configuration List** link.



The **Setup Transaction Type** page is opened.



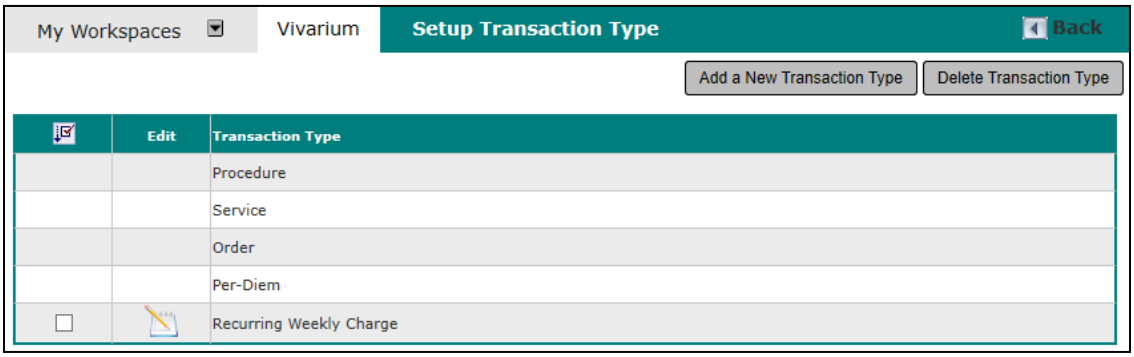
Select the checkbox at far left for the record to be deleted and click the **Delete Transaction Type** button. In this example the "Setup Charge" record is being deleted. A confirmation popup window appears.



Note that deleting an animal transaction type that is already in use on study applications will delete the transaction type from those applications. It is the responsibility of the iRIS™ system administrator to ensure the applicable transaction type is not in use before deleting it.

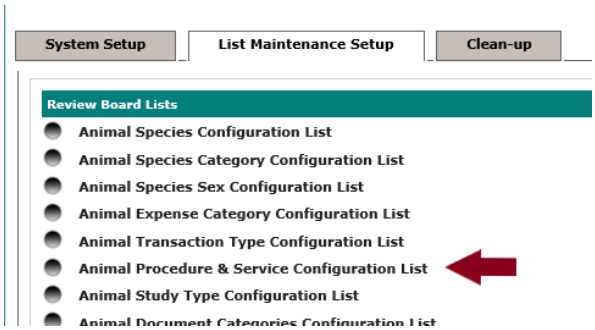
Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The record is deleted.

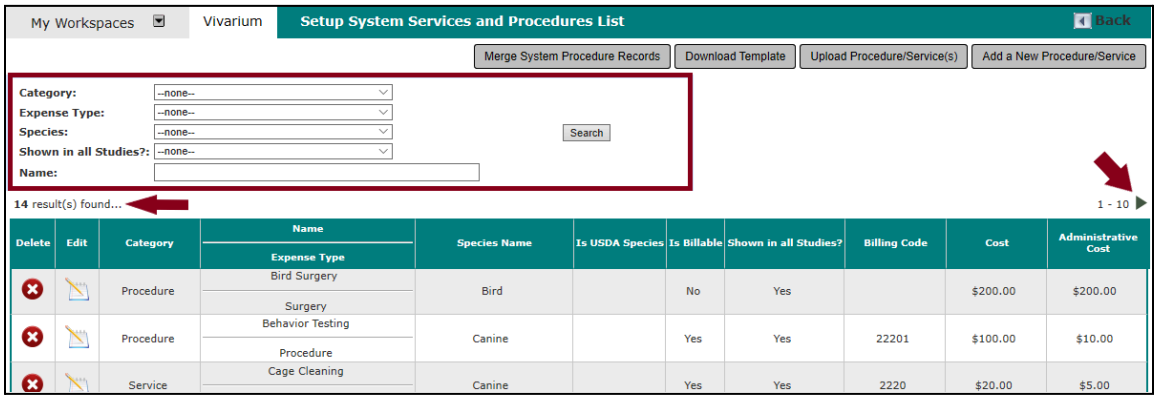


Animal Procedure & Service Configuration List

The Animal Procedure & Service Configuration List populates a list of animal procedures and services, with the option to include associated billing information. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Procedure & Service Configuration List** link.



The **Setup System Services and Procedures List** page is opened.



A search form at the top of the page allows the user to search for services and procedures by **Category**, **Expense Type**, **Species**, whether the item is **Shown in all Studies?**, **Name**, or any combination of these. Enter desired search criteria and click the **Search** button to filter the list.

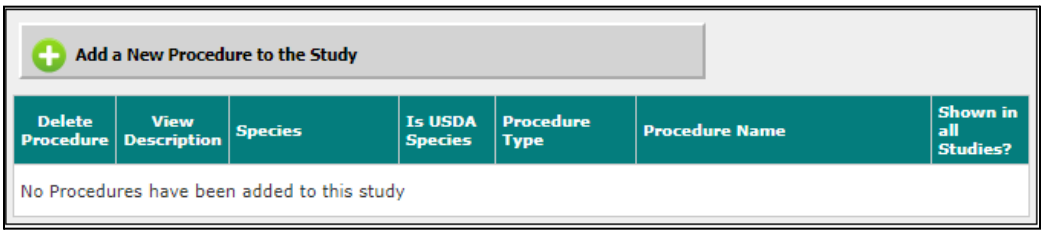
All previously created service and procedure items are shown in a table at the bottom of the page by default, before any search criteria are applied.

Note the red arrows in the screenshot above. The arrow at left highlights the record counter, which in this example indicates there are 14 existing service and procedure items. The arrow at right highlights the paging control (right-pointing triangle). Numbers to the left of the control indicate records 1-10 are currently displayed in the table. Click the paging control to access records 11-14. See the Navigation in iRIS™ section of this manual for more information about these paging controls.

Animal Procedure & Service Implementation – Application Side

The animal procedure and service list is employed in the following areas on the application side of iRIS™.

IACUC / ARC Study Application — the Animal Procedure & Service List is made available in an IACUC / ARC application via the **Add a New Procedure to the Study** button



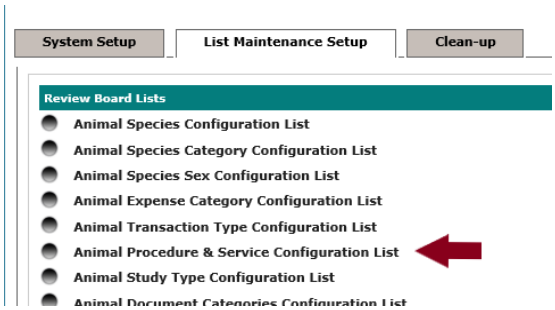
For more information about the IACUC study application, see the iRIS™ IACUC Assistant - IACUC Assistant Manual.

Animal Procedure & Service Implementation – Board Side

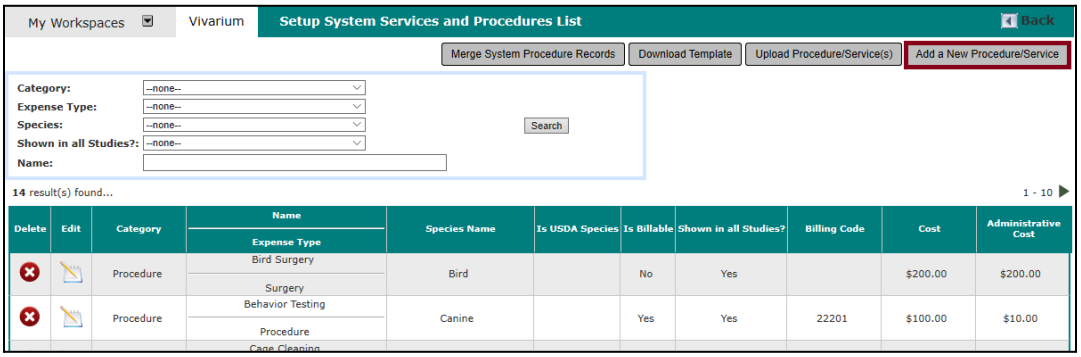
Animal procedures and services are added on the application/study side where required and are not generally subject to direct revision by the board.

Add Animal Procedure or Service

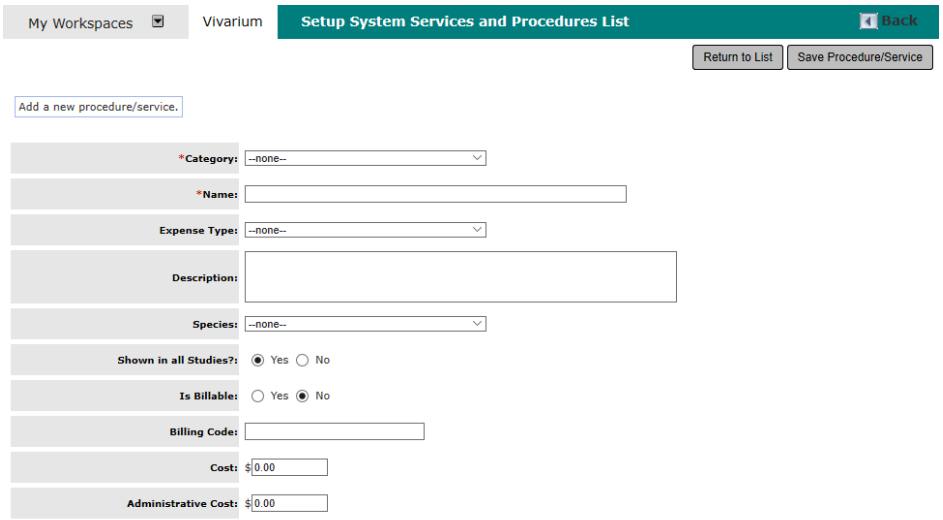
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Procedure & Service Configuration List** link.



The **Setup System Services and Procedures List** page is opened. Click the **Add a New Procedure/Service** button.

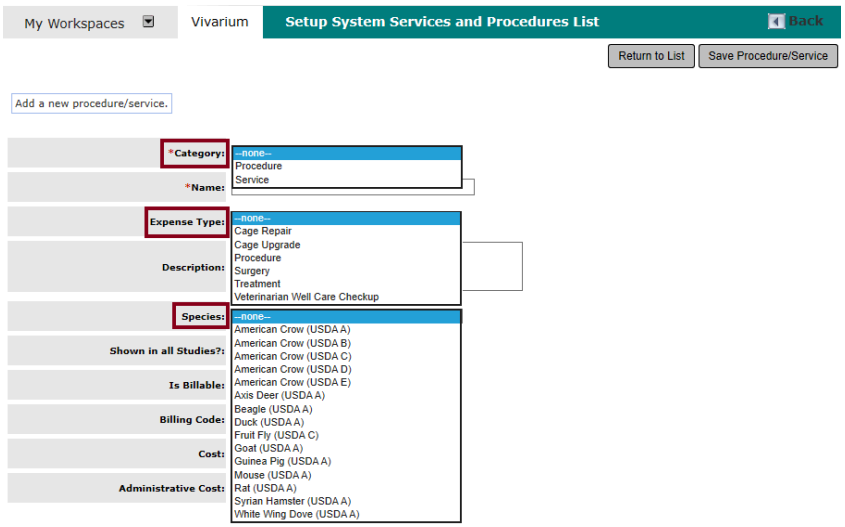


The **Add a new procedure/service** panel is opened.



Notice the default entries for **Shown in all Studies?**, **Is Billable?**, **Cost** and **Administrative Cost**.

The add panel includes three dropdown picklists: **Category**, **Expense Type** and **Species**. Note that **Expense Type** and **Species** are configurable lists, and their contents will vary by institution. In the example screenshot below, all three of these lists are expanded.

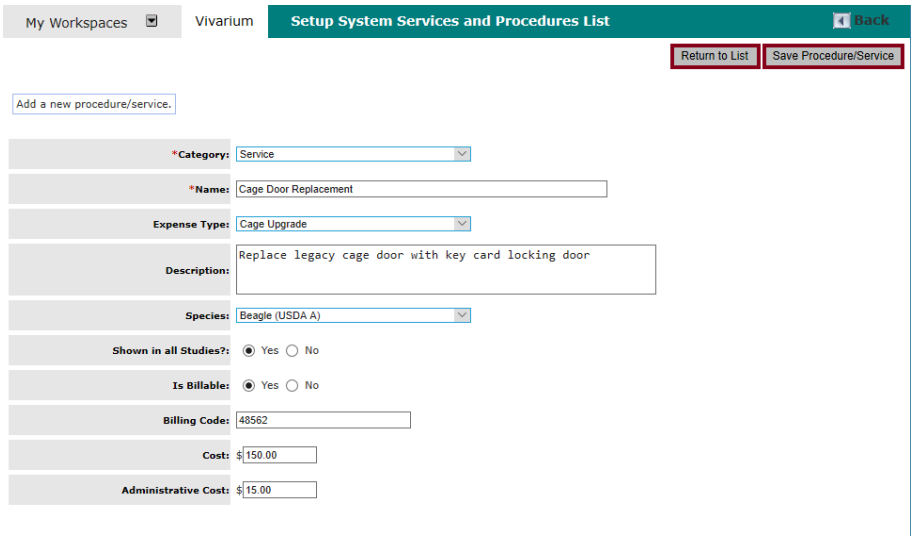


For more information about **Expense Type** list setup, see the Animal Expense Category Configuration List section of this manual.

For more information about **Species** list setup, see the Animal Species Configuration List section of this manual.

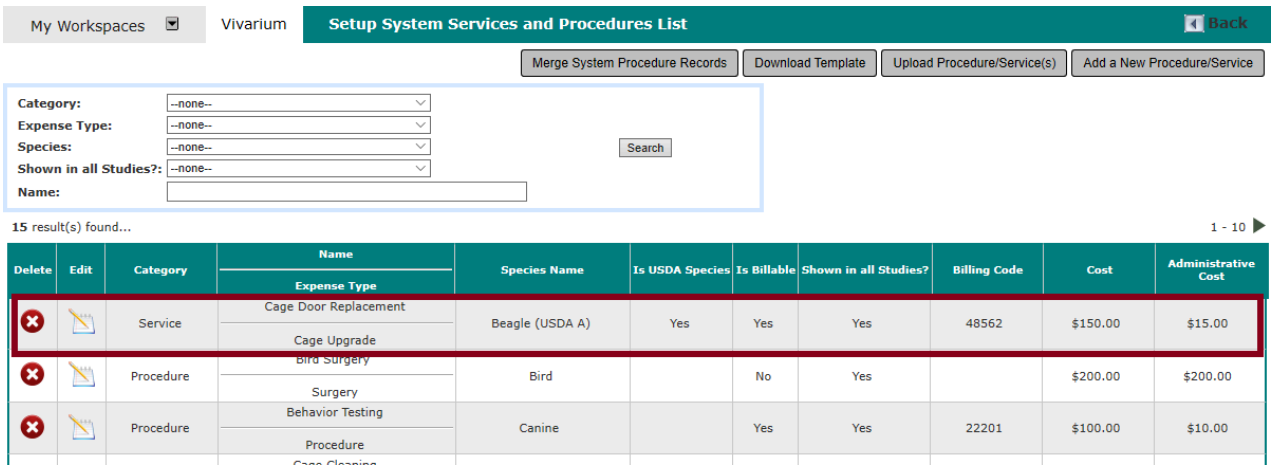
Make desired selections from the picklists and enter a **Name** and **Description** for the new procedure or service. Select “Yes” or “No” for **Shown in all Studies?** and **Is Billable?**, and if applicable, enter the applicable **Billing Code**, **Cost** and **Administrative Cost** as dictated by institution guidelines.

An example of a completed record is shown below.



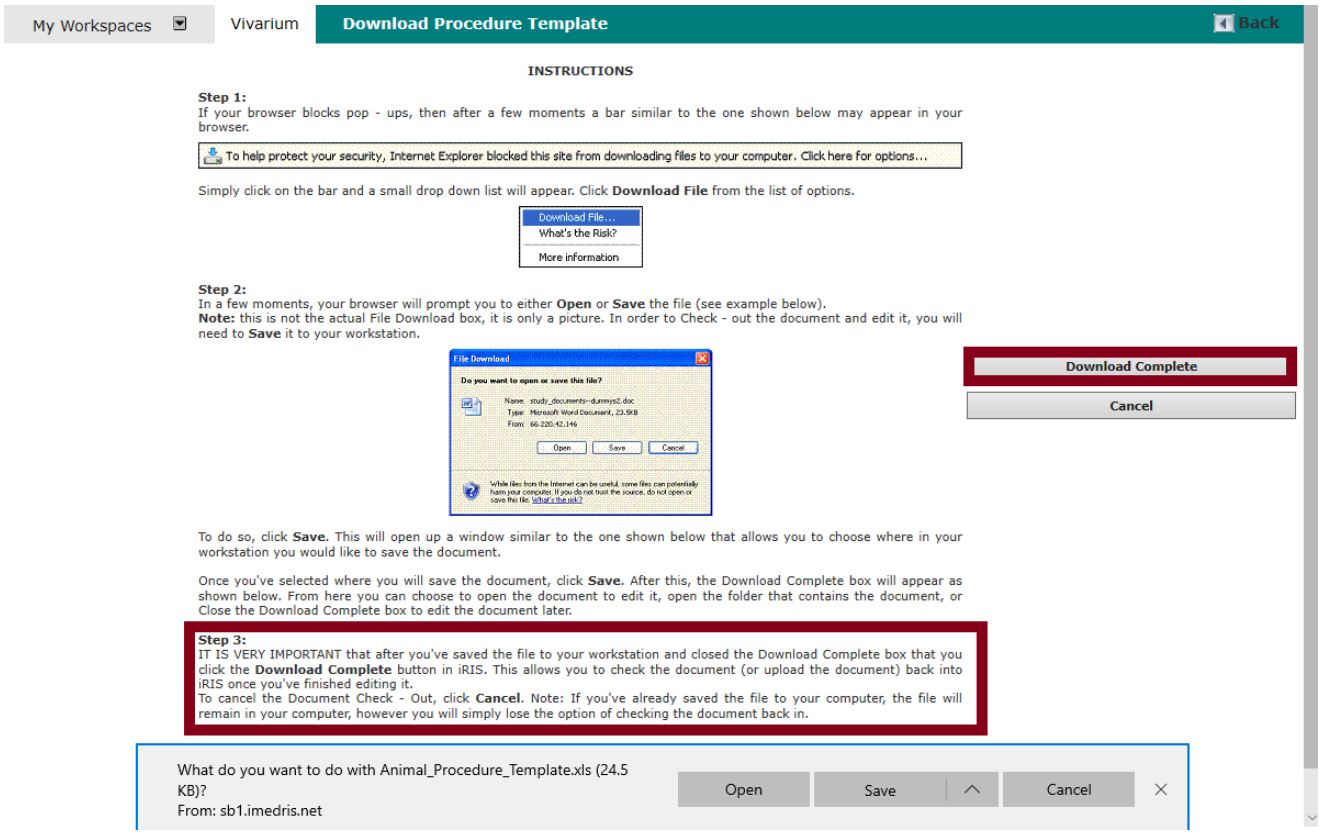
Click the **Return to List** button to close the panel without saving the new procedure or service.

Click the **Save Procedure/Service** button to save the new procedure or service and close the panel. The new item is added to the table on the **Setup System Services and Procedures List** page.



Download Animal Procedure or Service Template

The iRIS™ system provides a mechanism for adding a large quantity of procedure/service types at once, via population and upload of a pre-formatted Excel template. Click the **Download Template** button (shown in above screenshot) to begin. The **Download Procedure Template** page opens.

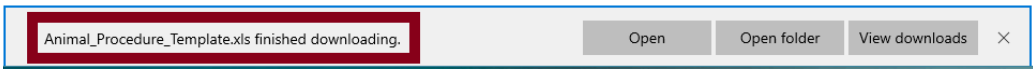


IMPORTANT: READ THE INSTRUCTIONS PROVIDED ON THE PAGE.

A download dialog popup window appears at the bottom of the **Download Procedure Template** page.

Click the **Cancel** button in the popup to close it without downloading the template, then click the **Cancel** button on the **Download Procedure Template** page to return to the **Setup System Services and Procedures List** page.

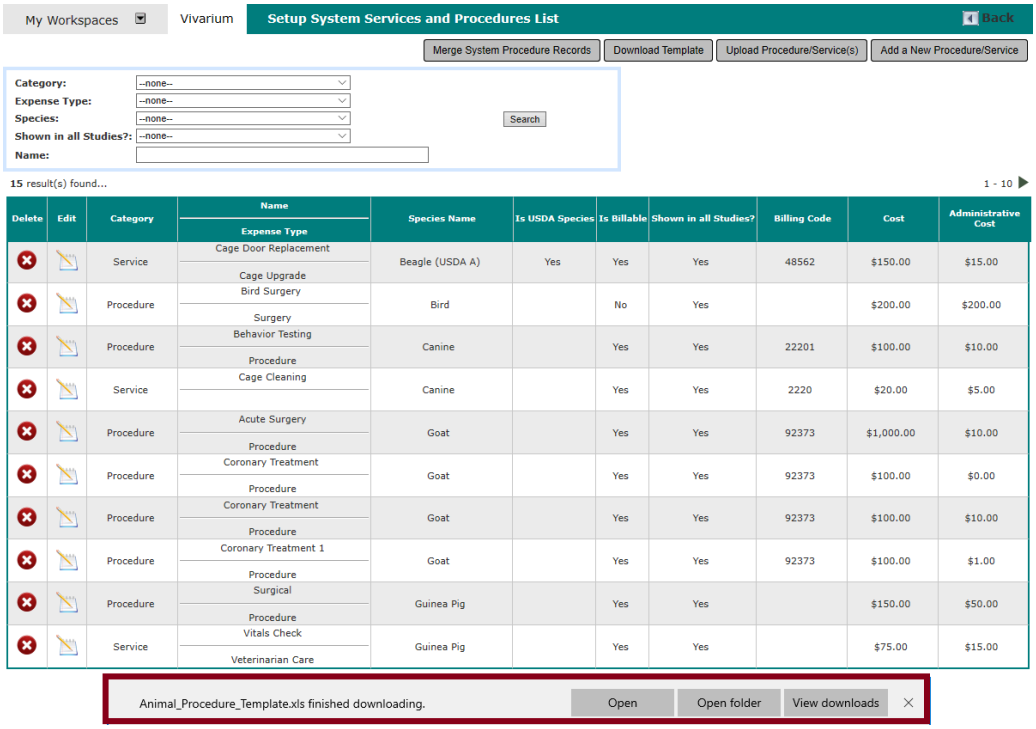
Click the **Save** button in the popup to save the template to the default Downloads folder on the computer. Click the upward-pointing arrow to the right of the **Save** button to access Save As options, which allow for saving the template to the user's desired location on the computer. The download dialog popup message changes when the download is complete, as shown below.



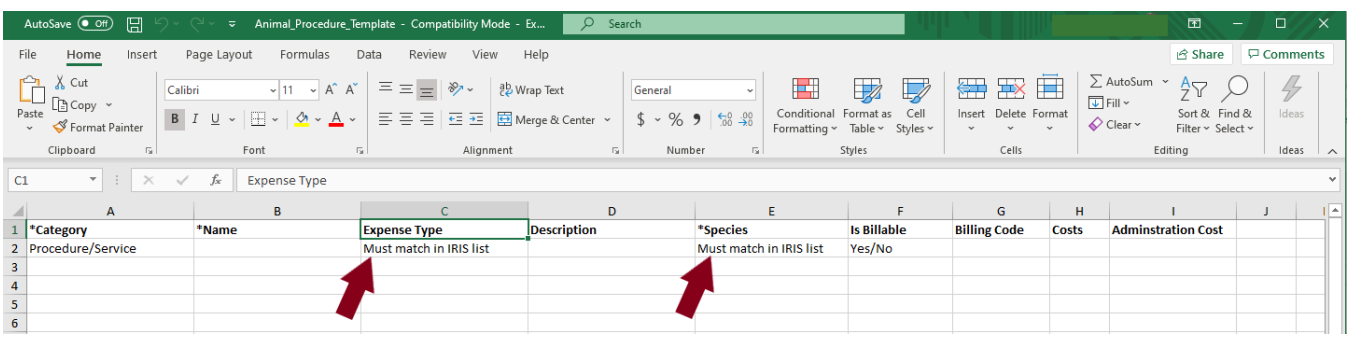
As explained in the instructions, the iRIS™ system handles the template as a single file that is checked out, populated, then checked back in. After the template is downloaded the user MUST click the **Download Complete** button on the **Download Procedure Template** page to finalize the 'check out' part of the process.

*Note: The download dialog popup persists on the computer screen until the user closes it by selecting an action button on the popup. Clicking the **Download Complete** button on the **Download Procedure Template** page does not close the popup dialog. To ensure the check-out process is complete, click the **Download Complete** button on*

*the **Download Procedure Template** page before continuing with the template. As shown below, the dialog popup will still be there when the user is returned to the **Setup System Services and Procedures List** page.*



Navigate to the downloaded template file and open it.



As shown in the screenshot above, instructions are provided in columns with specific data or formatting requirements.

Either “Procedure” or “Service” must be entered in the **Category** column. This is a required data value.

Name is a required data value.

The **Expense Type** column can only contain **Expense Type**s that *exactly* match entries in the Animal Expense Category Configuration List. For more information about **Expense Type** list setup, see the Animal Expense Category Configuration List section of this manual.

Enter a brief **Description** of the procedure or service in the **Description** column.

The **Species** column can only contain **Species** that *exactly* match entries in the Animal Species Category Configuration List. This is a required data value. For more information about **Species** list setup, see the Animal Species Configuration List section of this manual.

Enter "Yes" or "No" in the **Is Billable?** column.

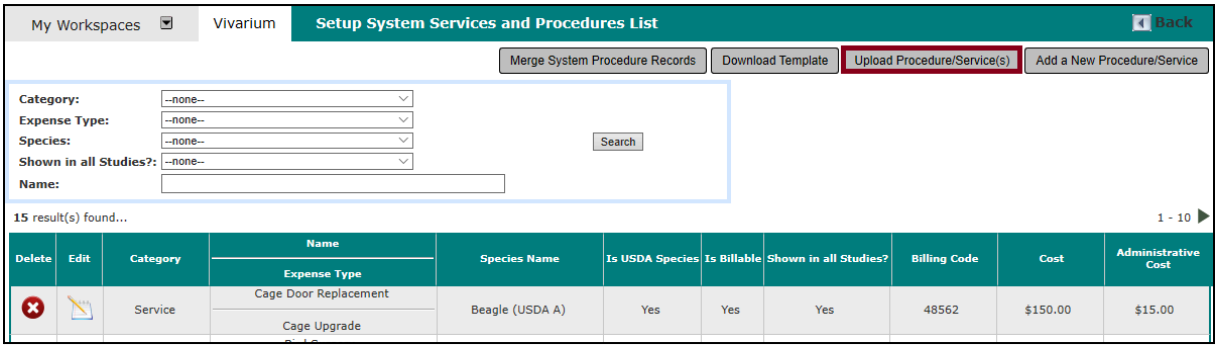
Use the **Billing Code** column to enter any billing code, as required by the institution.

Enter the dollar price of the procedure or service in the **Costs** column. This field accepts up to two decimal places.

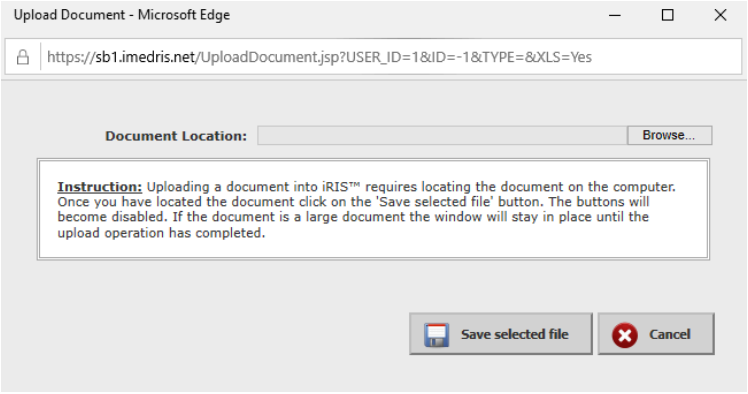
Enter the overhead expense assigned to the procedure or service in the **Administration Cost** column. This field accepts up to two decimal places.

Upload Animal Procedure or Service Template

When the Animal Procedure or Service Template is populated with all desired data, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab > Animal Procedure & Service Configuration List link to access the **Setup System Services and Procedures List** page. Click the **Upload Procedure/Service(s)** button.



An upload dialog popup appears.



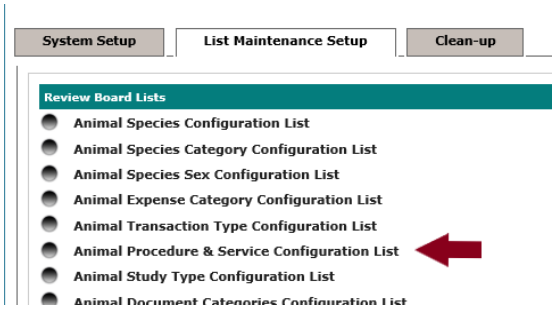
Click the **Cancel** button to close the dialog without completing the upload.

Click the **Browse…** button to navigate to the completed template and select it, then click the **Save selected file** button to complete the upload.

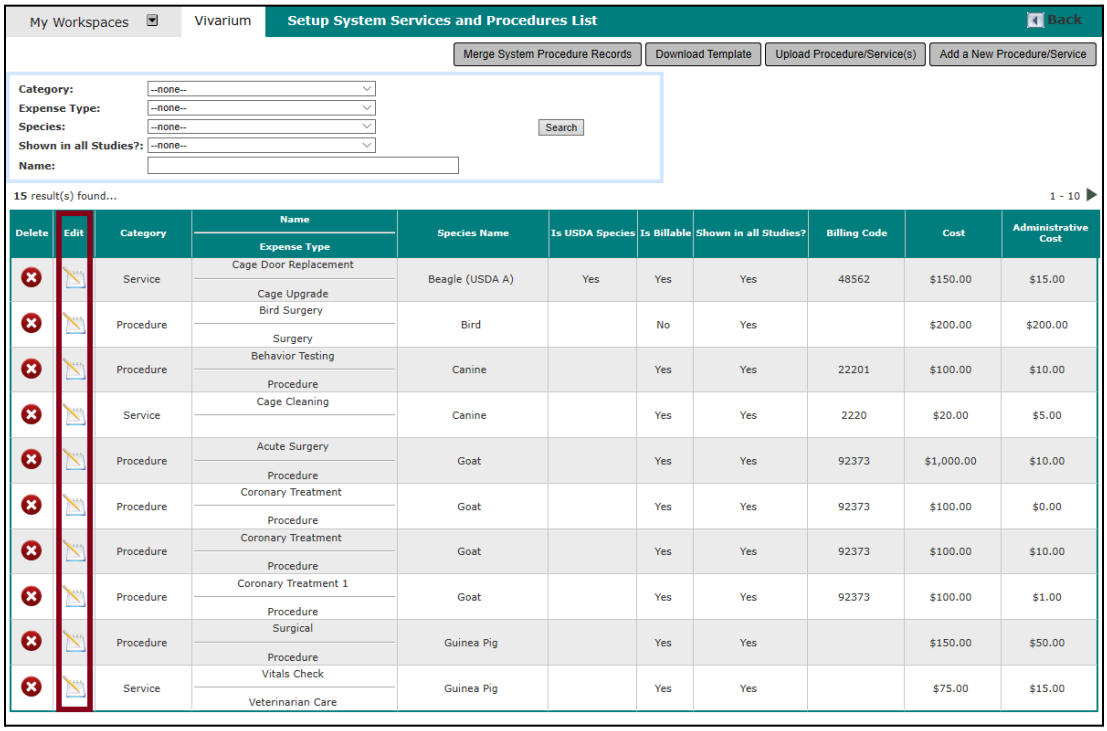
Review the uploaded records in the **Setup system Services and Procedures List** page to ensure the uploaded procedure and service records have correctly populated all columns. Any records that do not meet data content or formatting requirements must be edited or deleted promptly, to ensure they cannot be mistakenly assigned to studies.

Edit Animal Procedure or Service

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Procedure & Service Configuration List** link.

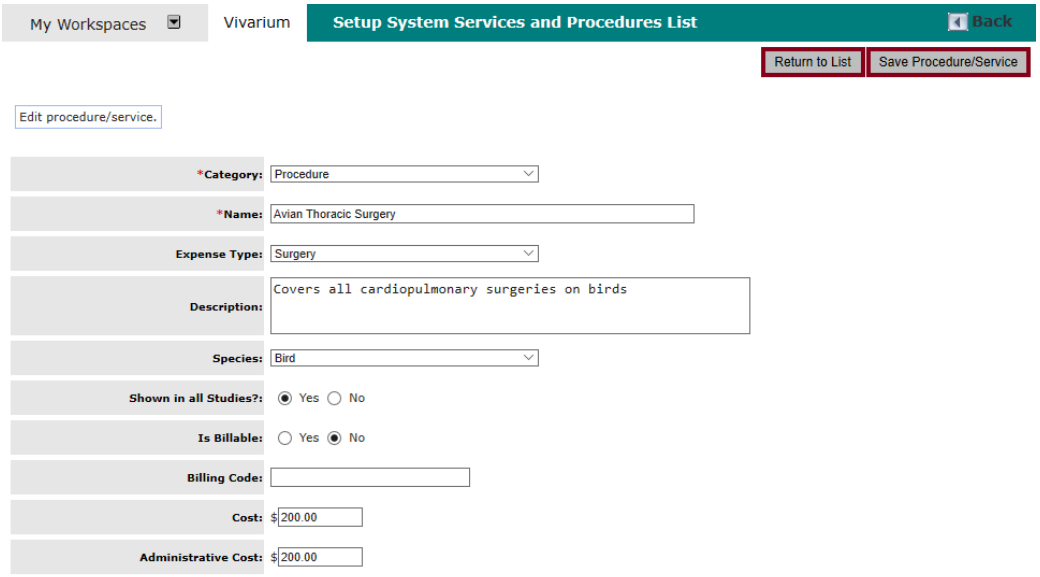


The **Setup System Services and Procedures List** page is opened. Click the icon in the **Edit** column for the applicable record.



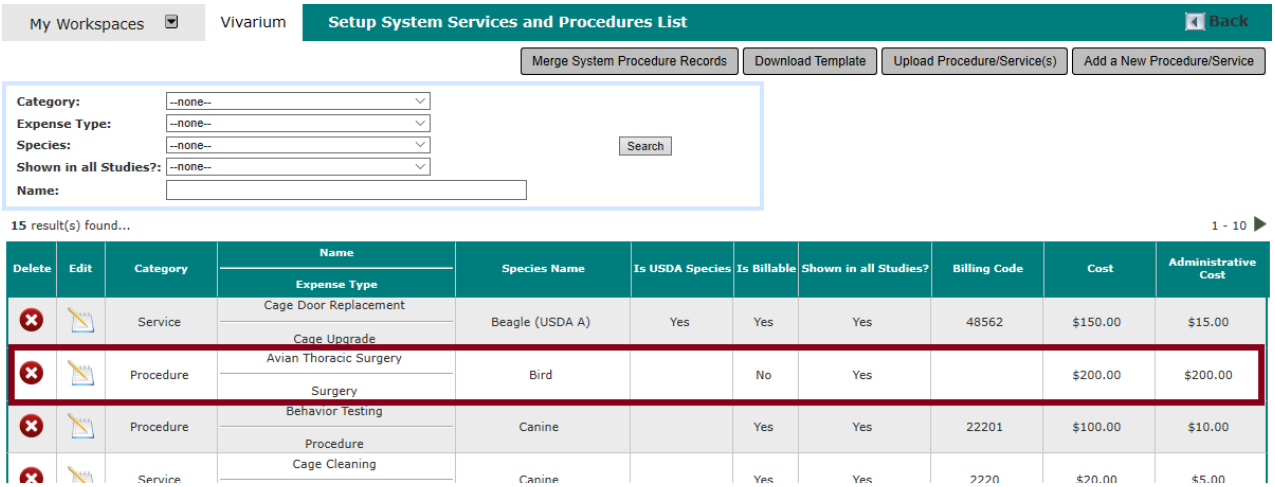
Delete	Edit	Category	Name / Expense Type	Species Name	Is USDA Species	Is Billable	Shown in all Studies?	Billing Code	Cost	Administrative Cost
		Service	Cage Door Replacement / Cage Upgrade	Beagle (USDA A)	Yes	Yes	Yes	48562	$150.00	$15.00
		Procedure	Bird Surgery / Surgery	Bird		No	Yes		$200.00	$200.00
		Procedure	Behavior Testing / Procedure	Canine		Yes	Yes	22201	$100.00	$10.00
		Service	Cage Cleaning	Canine		Yes	Yes	2220	$20.00	$5.00
		Procedure	Acute Surgery / Procedure	Goat		Yes	Yes	92373	$1,000.00	$10.00
		Procedure	Coronary Treatment / Procedure	Goat		Yes	Yes	92373	$100.00	$0.00
		Procedure	Coronary Treatment / Procedure	Goat		Yes	Yes	92373	$100.00	$10.00
		Procedure	Coronary Treatment 1 / Procedure	Goat		Yes	Yes	92373	$100.00	$1.00
		Procedure	Surgical / Procedure	Guinea Pig		Yes	Yes		$150.00	$50.00
		Service	Vitals Check / Veterinarian Care	Guinea Pig		Yes	Yes		$75.00	$15.00

The **Edit a procedure/service** panel is opened for the selected procedure or service. In the screenshot below, the "Bird Surgery" record (second record in screenshot above) is opened for editing and its **Name** and **Description** fields are updated.



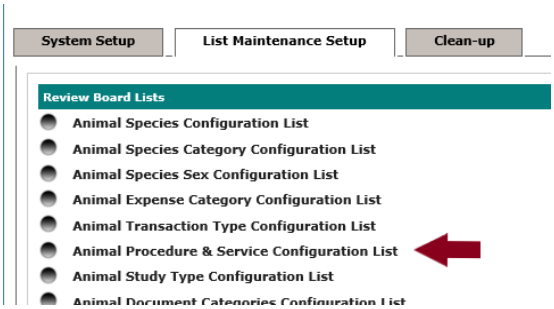
Click the **Return to List** button to close the edit panel without saving changes and return to the **Setup System Services and Procedures List** page.

Click the **Save Procedure/Service** button to save changes, close the edit panel and return to the **Setup System Services and Procedures List** page. The record is revised.



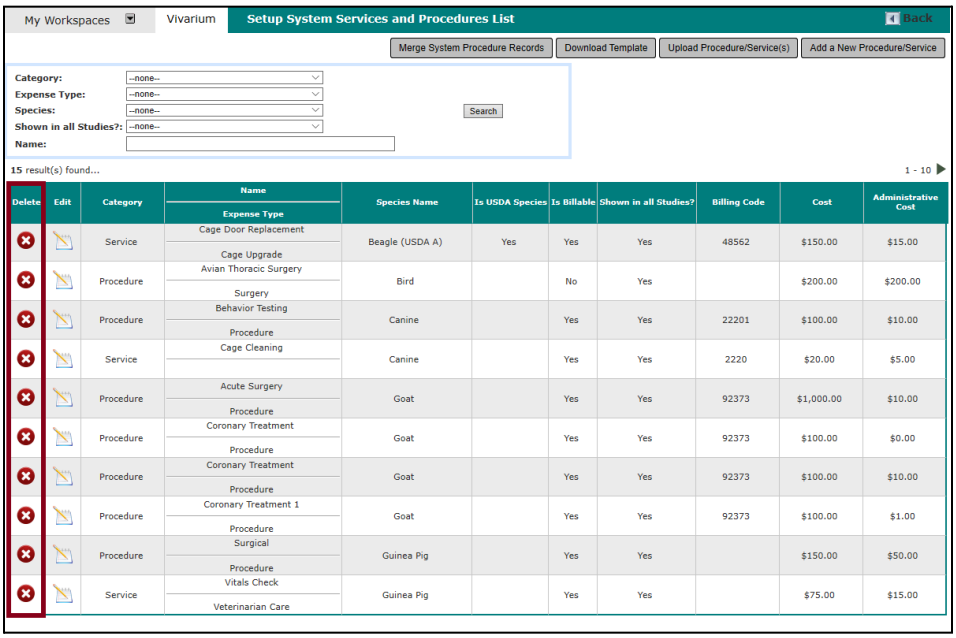
Delete Animal Procedure or Service

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Procedure & Service Configuration List** link.



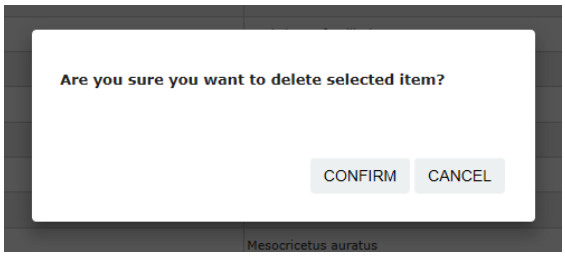
The **Setup System Services and Procedures List** page is opened.

Click the icon in the **Delete** icon for the applicable record.



Delete	Edit	Category	Name / Expense Type	Species Name	Is USDA Species	Is Billable	Shown in all Studies?	Billing Code	Cost	Administrative Cost
		Service	Cage Door Replacement / Cage Upgrade	Beagle (USDA A)	Yes	Yes	Yes	48562	$150.00	$15.00
		Procedure	Avian Thoracic Surgery / Surgery	Bird		No	Yes		$200.00	$200.00
		Procedure	Behavior Testing / Procedure	Canine		Yes	Yes	22201	$100.00	$10.00
		Service	Cage Cleaning	Canine		Yes	Yes	2220	$20.00	$5.00
		Procedure	Acute Surgery / Procedure	Goat		Yes	Yes	92373	$1,000.00	$10.00
		Procedure	Coronary Treatment / Procedure	Goat		Yes	Yes	92373	$100.00	$0.00
		Procedure	Coronary Treatment / Procedure	Goat		Yes	Yes	92373	$100.00	$10.00
		Procedure	Coronary Treatment 1 / Procedure	Goat		Yes	Yes	92373	$100.00	$1.00
		Procedure	Surgical / Procedure	Guinea Pig		Yes	Yes		$150.00	$50.00
		Service	Vitals Check / Veterinarian Care	Guinea Pig		Yes	Yes		$75.00	$15.00

A confirmation popup dialog window appears.



Click **CANCEL** to close the popup without deleting the record and return to the **Setup System Services and Procedures List** page.

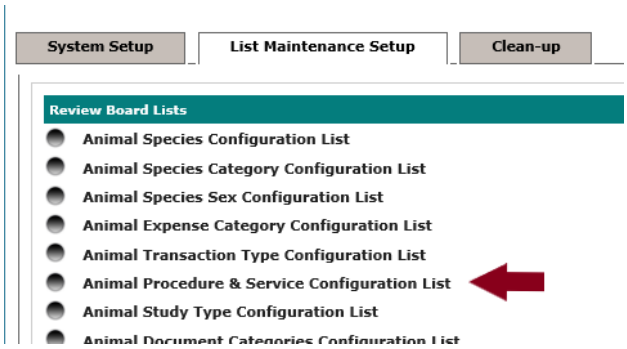
Click **CONFIRM** to complete deletion of the record and return to the **Setup System Services and Procedures List** page.

Merge Animal Procedure or Service

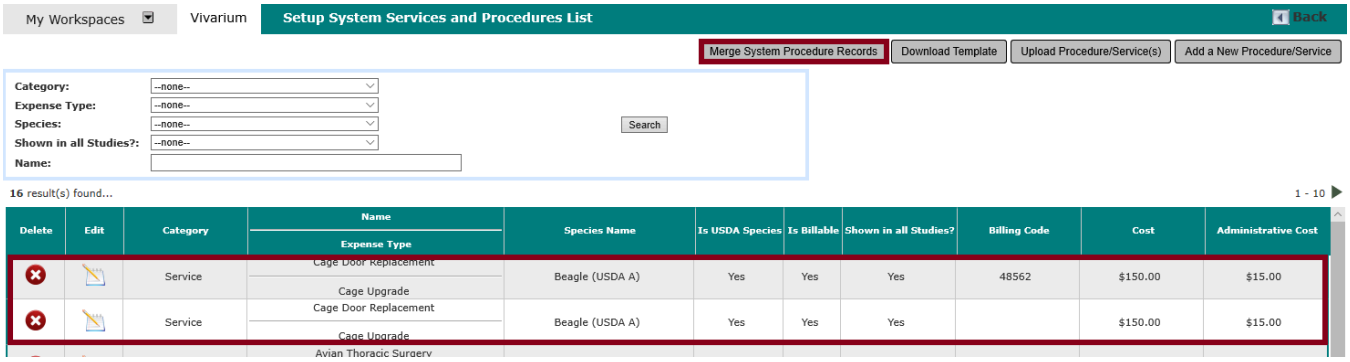
Sometimes a duplicate or erroneous procedure or service record is created and then assigned to one or more study applications before the mistake is caught.

In that situation, the duplicate or erroneous record can be merged with a valid record. The valid record is then substituted for the duplicate/erroneous record previously assigned to study applications.

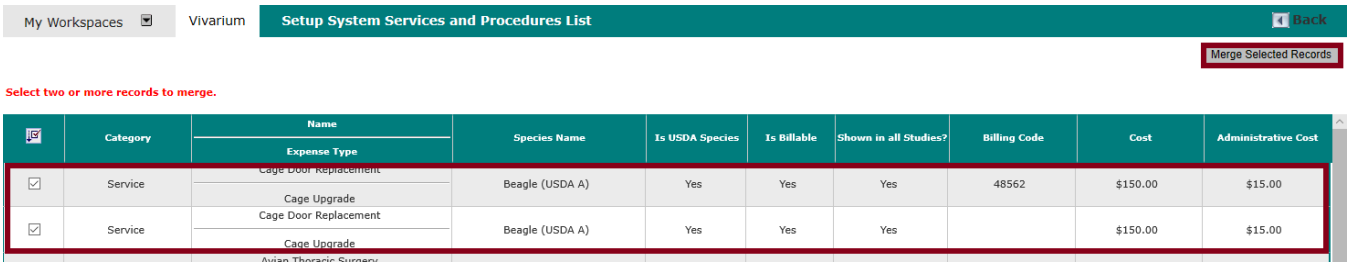
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Procedure & Service Configuration List** link.



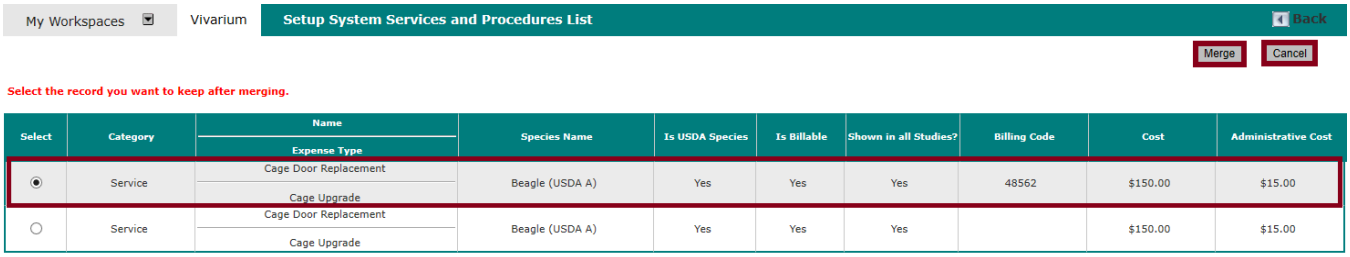
The **Setup System Services and Procedures List** page is opened.



In the example shown above, the second "Cage Door Replacement" record in the list is missing a **Billing Code**, but this record may have been assigned to one or more studies. Click the **Merge Device Records** button to begin. A merge panel opens.

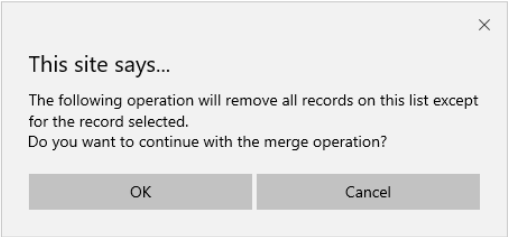


Select the checkboxes at far left for the records to be merged and click the **Merge Selected Records** button. A new panel opens with only the selected records listed.

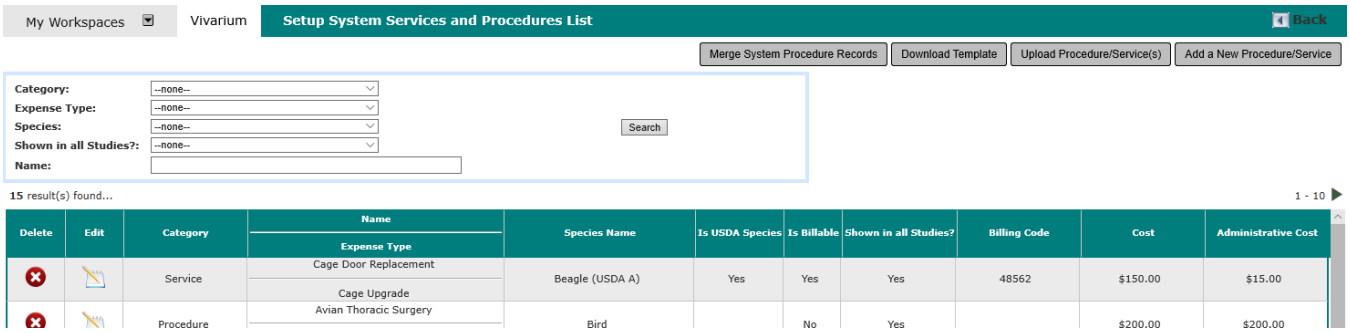


Click the **Cancel** button to close the panel without merging the records.

Note the red instruction text above the table: select the radio button at far left for the record to be KEPT, then click the **Merge** button. A confirmation popup window appears.



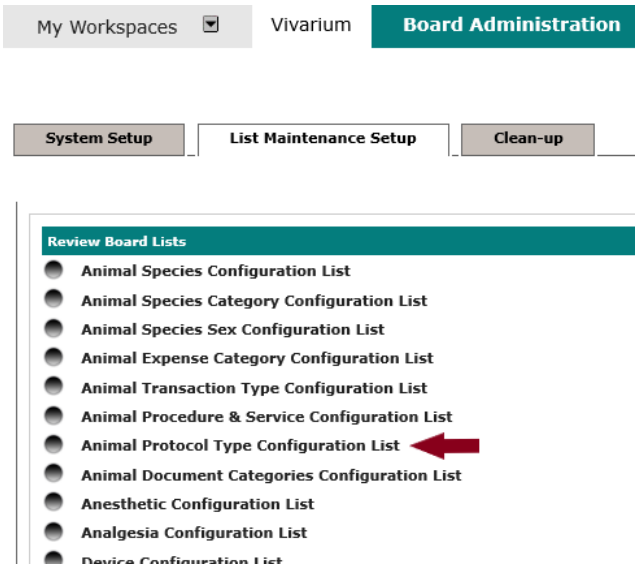
As the popup states, all records on the list will be deleted except for the selected record. Click **Cancel** to close the popup without merging the records. Click **OK** to complete the merge and return to the **Setup System Services and Procedures List** page, where the merge can be confirmed.



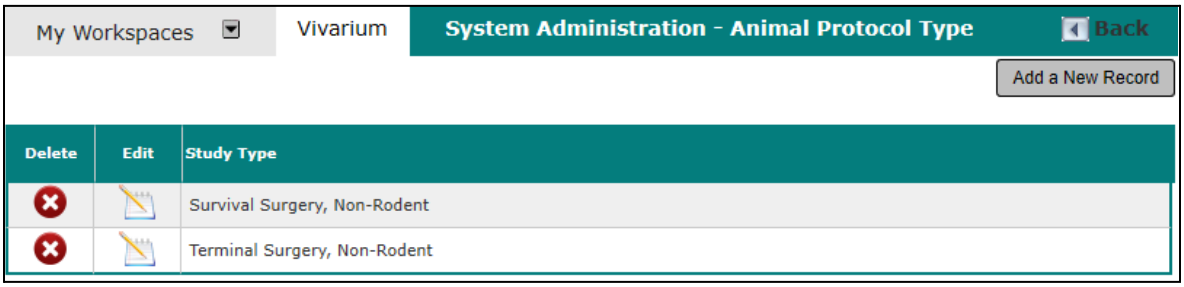
Animal Protocol / Study Type Configuration List

This is where a list of study types, in terms of expected subject animal outcomes, is maintained in the iRIS™ system. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Protocol Type Configuration List** link.

Note that at some institutions, the term "Study" is substituted for "Protocol". These terms may be used interchangeably in manual text and screenshots.



The **Animal Protocol Type** page is opened.



Animal Protocol / Study Type Implementation – Application Side

Where this field is in use by the institution, it appears in the study application form.

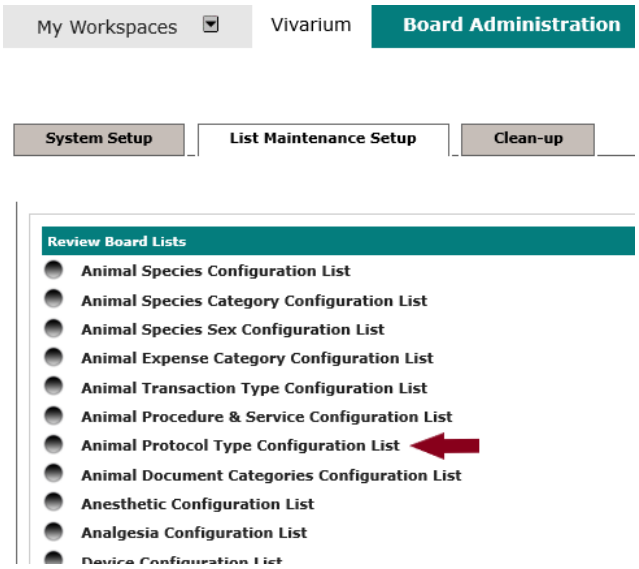
Animal Protocol / Study Type Implementation – Board Side

Animal study types are designated on the application side where required and are not generally subject to direct revision by the board.

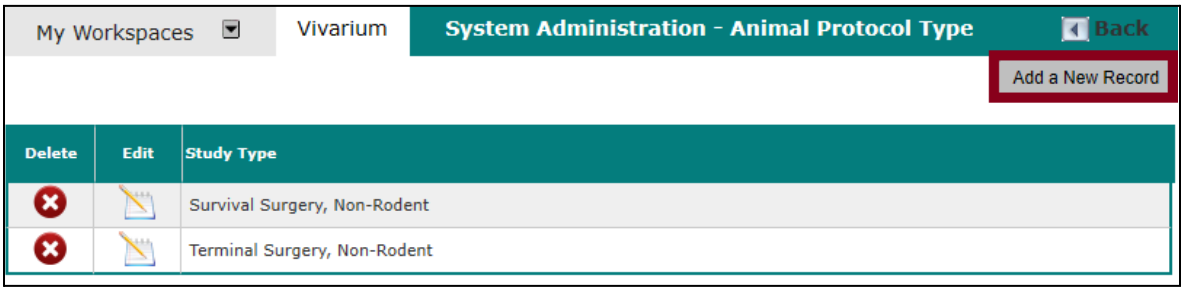
Add Animal Protocol / Study Type

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Protocol Type Configuration List** link.

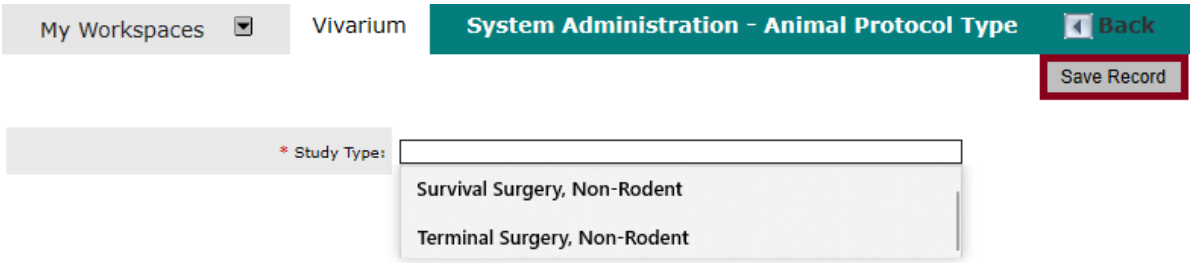
Note that at some institutions, the term "Study" is substituted for "Protocol". These terms may be used interchangeably in manual text and screenshots.



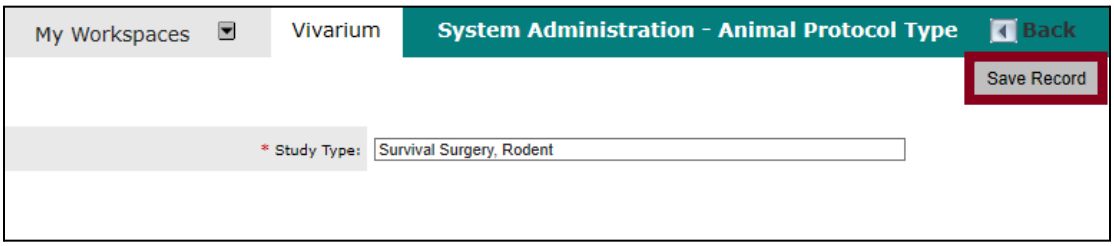
The **Animal Protocol Type** page is opened. Click the **Add a New Record** button.



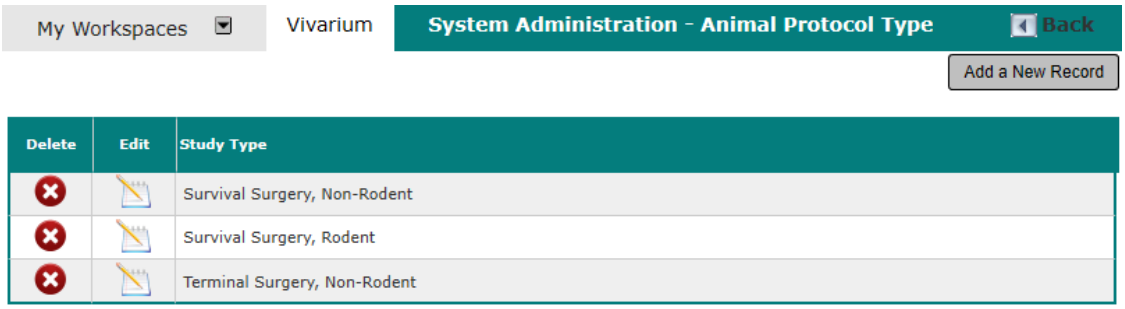
An add panel is opened.



Clicking in the **Study Type** field opens a dropdown list of previous entries. Either select an item from the list and make edits to it for creation of a new record, or manually enter the desired **Study Type**. An example of the filled panel is shown below.



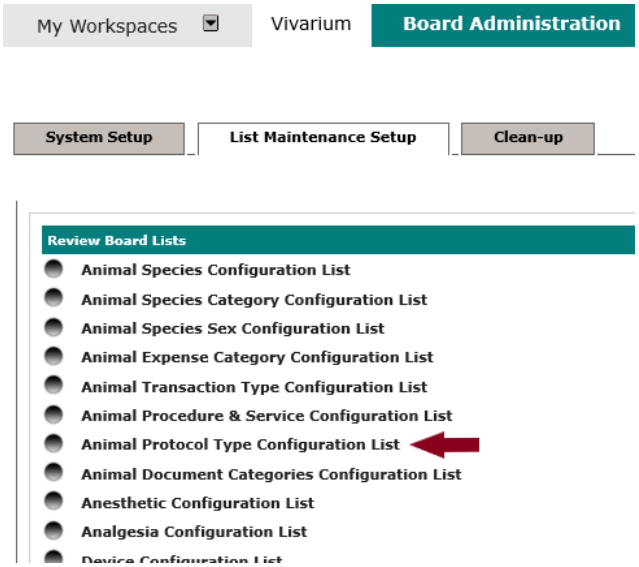
Click the **Save Record** button to save the new record. The new record is added to the list on the **Animal Protocol Type** page.



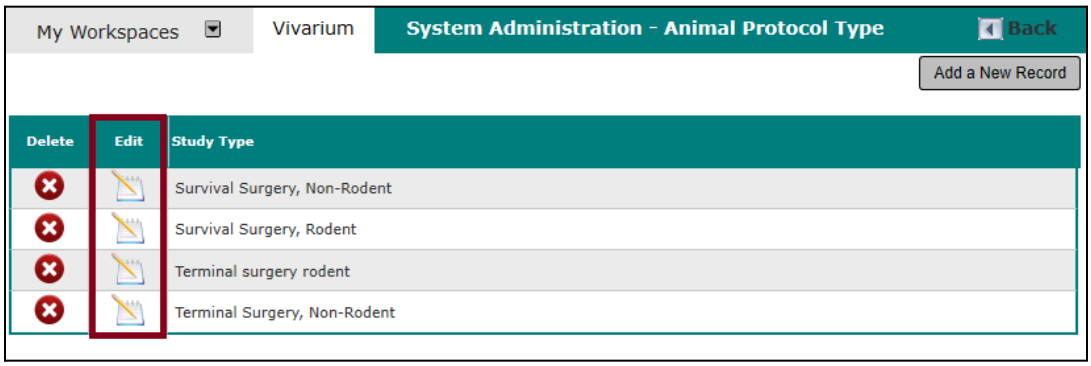
Edit Animal Protocol / Study Type

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Protocol Type Configuration List** link.

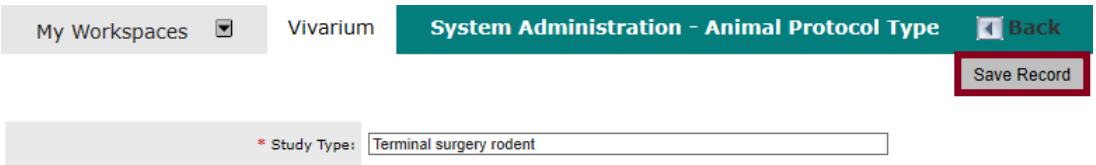
Note that at some institutions, the term "Study" is substituted for "Protocol". These terms may be used interchangeably in manual text and screenshots.



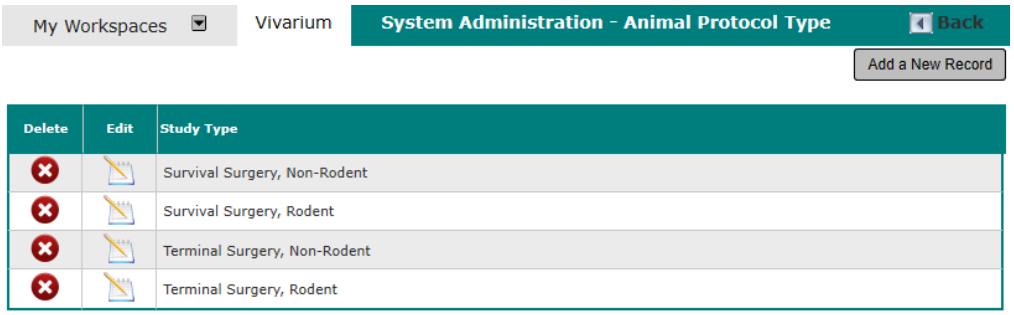
The **Animal Protocol Type** page is opened. Click the icon in the **Edit** column for the applicable record.



The record is opened in an edit panel.



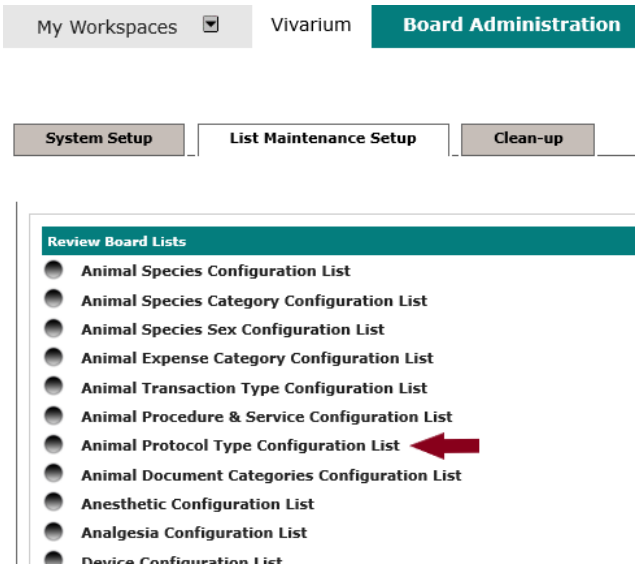
Make desired changes and click the **Save Record** button to save changes and close the edit panel. The edit panel closes and the record is revised on the **Animal Protocol Type** page.



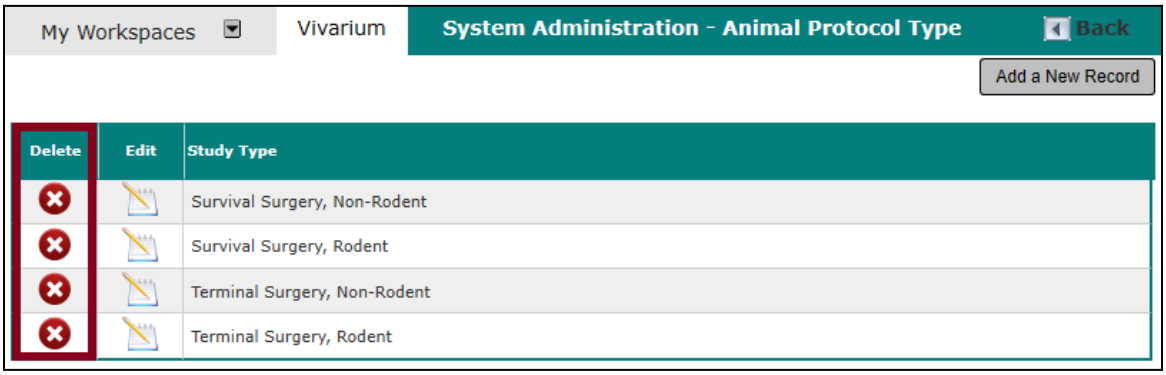
Delete Animal Protocol / Study Type

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Protocol Type Configuration List** link.

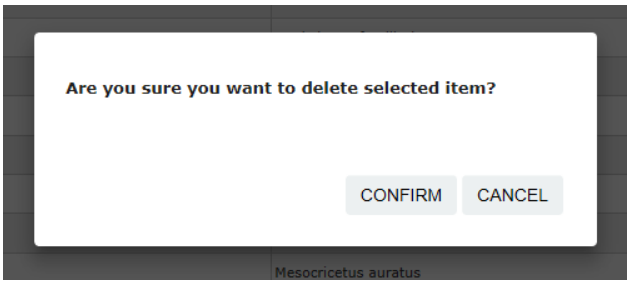
Note that at some institutions, the term "Study" is substituted for "Protocol". These terms may be used interchangeably in manual text and screenshots.



The **Animal Protocol Type** page is opened. Click the icon in the **Delete** column for the applicable record.



A confirmation popup dialog window appears.

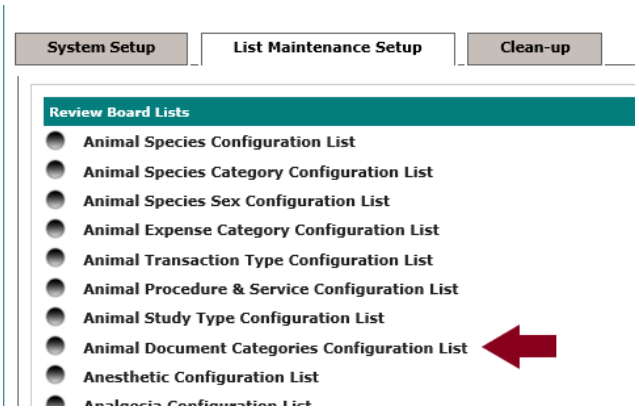


Click **CANCEL** to close the popup without deleting the record and return to the Animal Protocol Type page.

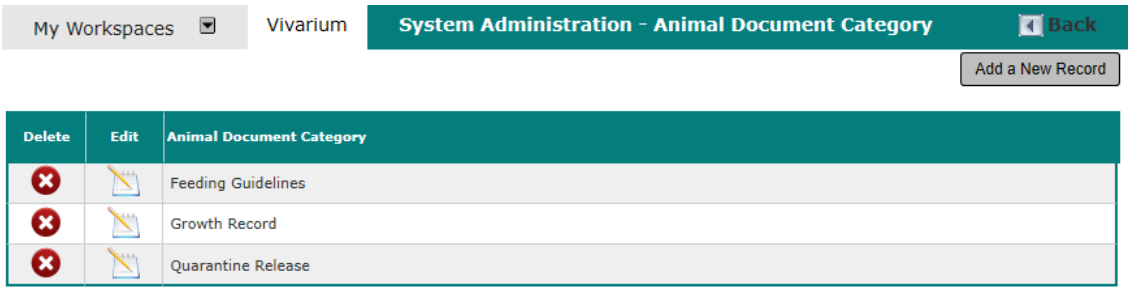
Click **CONFIRM** to complete deletion of the record and return to the Animal Protocol Type page.

Animal Document Categories Configuration List

This is where a list of document types associated with subject animals is maintained in the iRIS™ system. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Document Categories Configuration List** link.

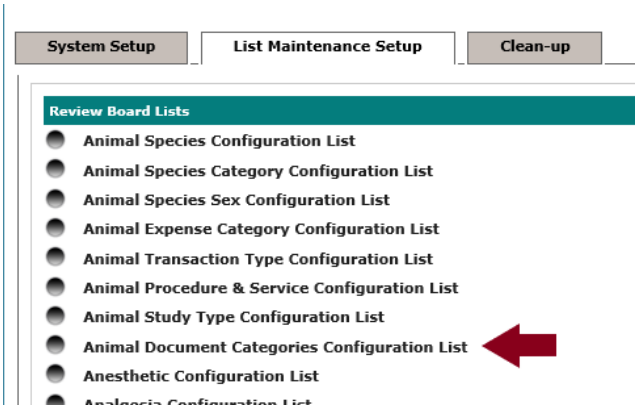


The **Animal Document Category** page is opened.

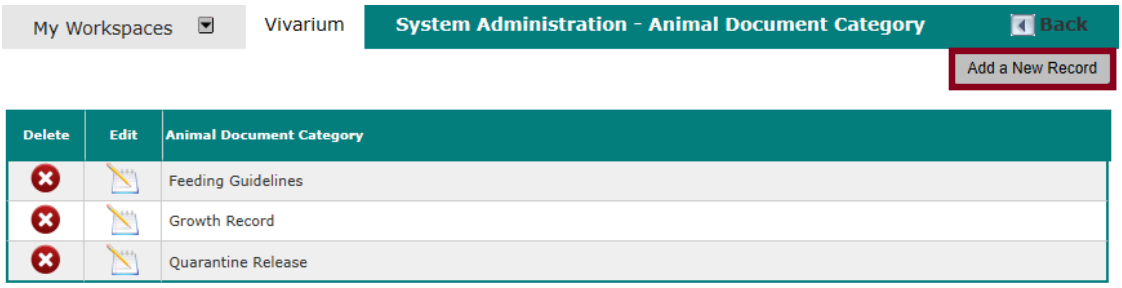


Add Animal Document Category

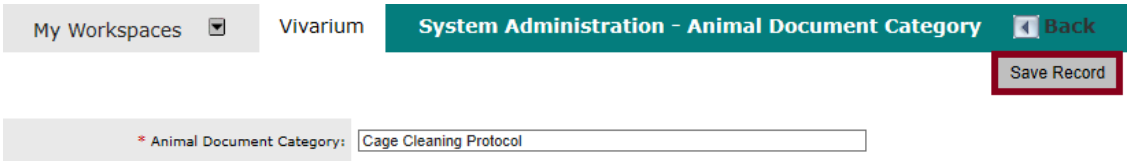
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Document Categories Configuration List** link.



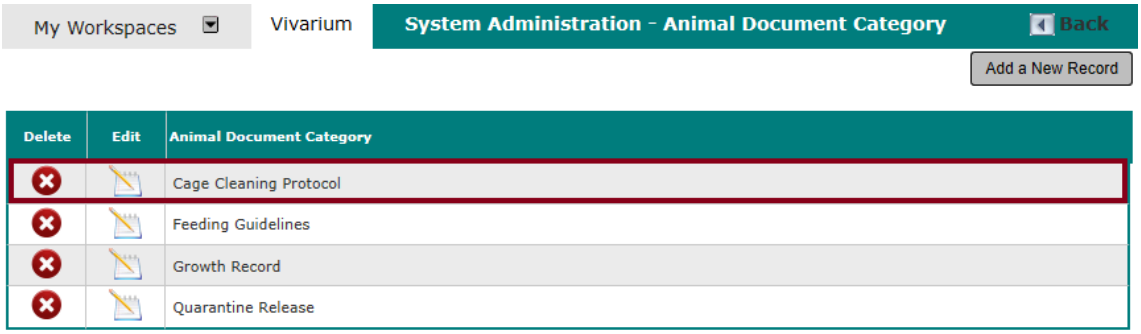
The **Animal Document Category** page is opened. Click the **Add a New Record** button.



An add panel is opened. Enter the new **Animal Document Category** and click the **Save Record** button.

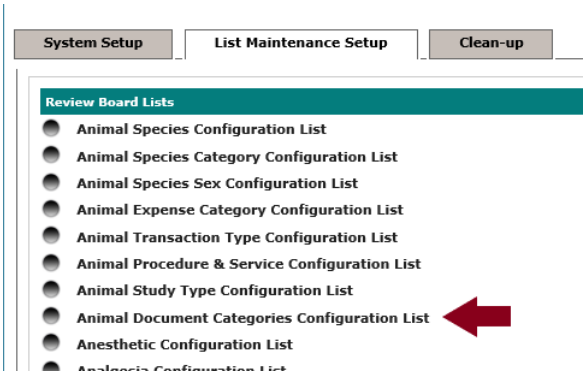


The record is added to the list on the main **Animal Document Category** page.

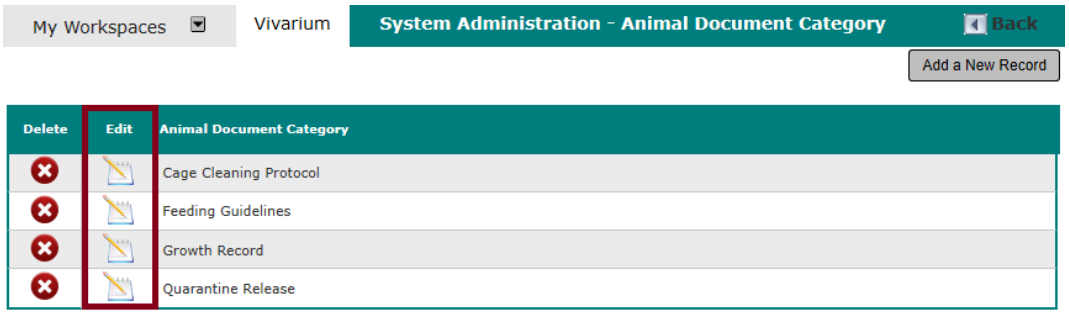


Edit Animal Document Category

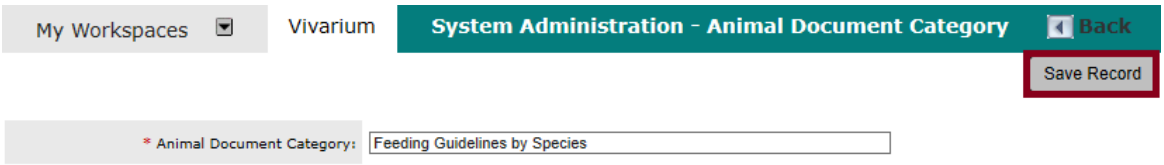
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Document Categories Configuration List** link.



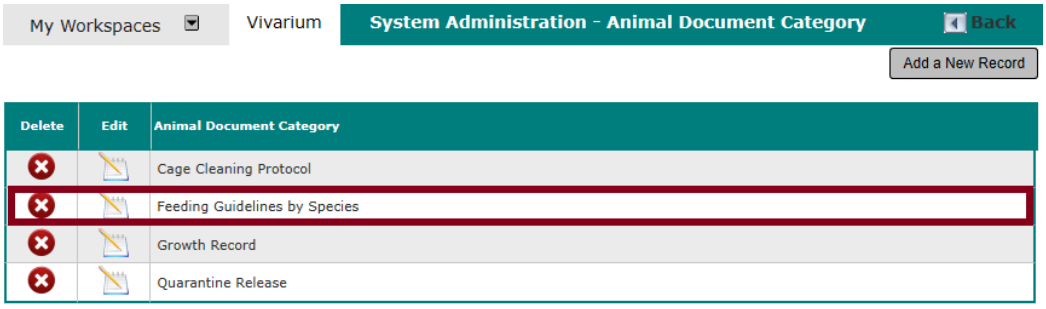
The **Animal Document Category** page is opened. Click the icon in the **Edit** column for the applicable record.



An edit panel is opened. Enter desired changes and click the **Save Record** button.

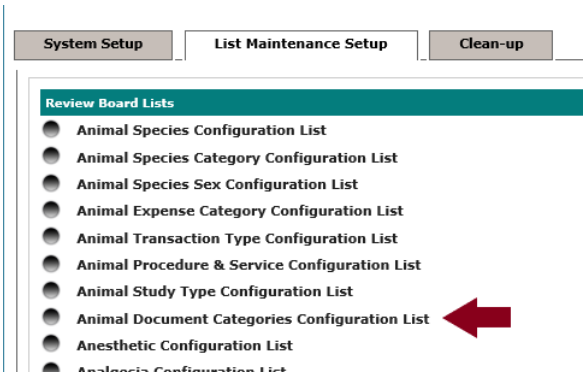


The record is revised on the list on the main **Animal Document Category** page.

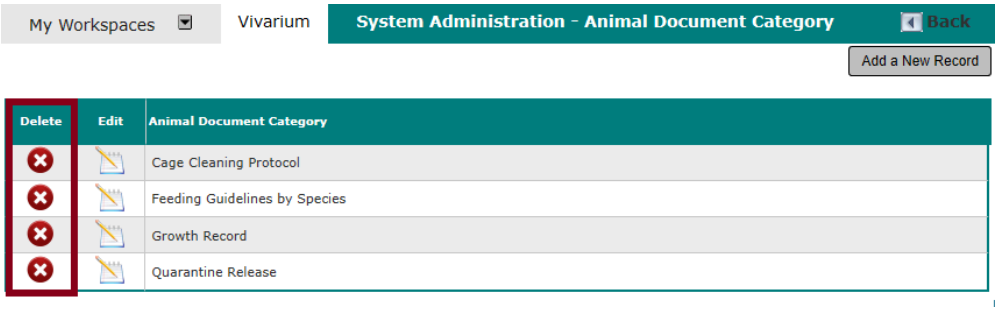


Delete Animal Document Category

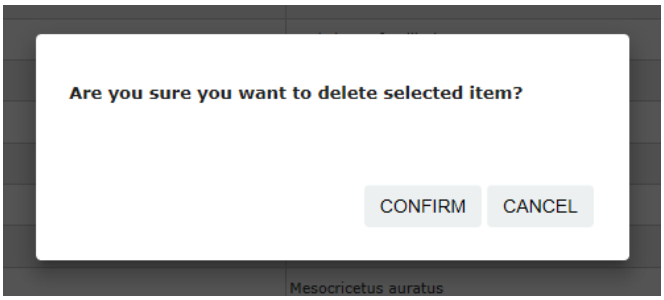
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Animal Document Categories Configuration List** link.



The **Animal Document Category** page is opened. Click the icon in the **Delete** column for the applicable record. In this example, the "Growth Record" item is being deleted.

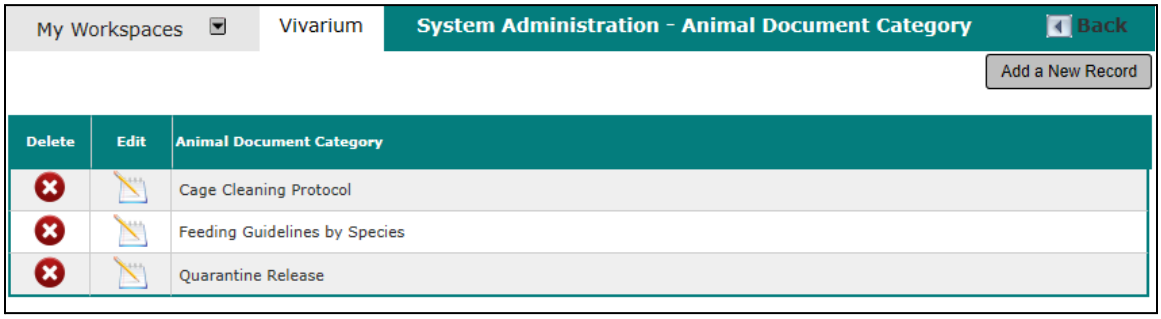


A confirmation popup window appears.



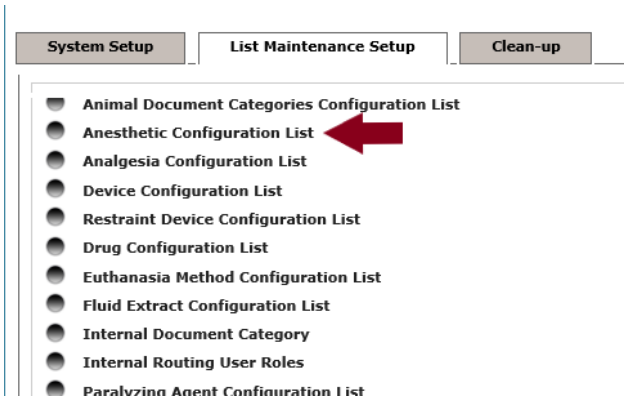
Click **CANCEL** to close the popup without deleting the record.

Click **CONFIRM** to delete the record and close the popup. The record is deleted from the list on the main **Animal Document Category** page.

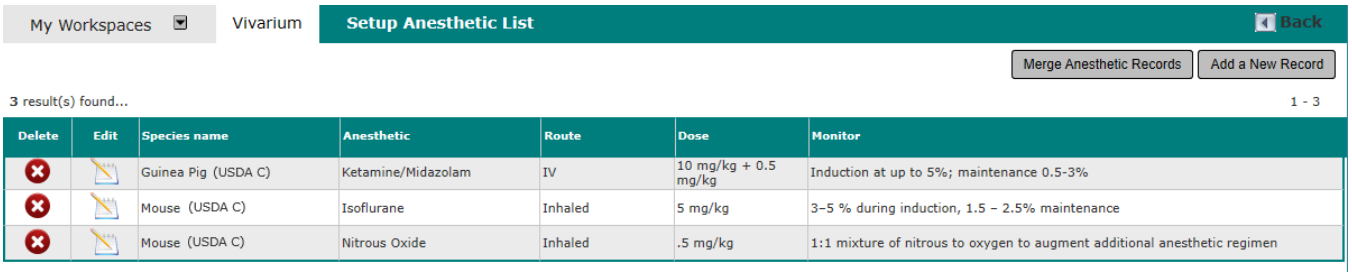


Anesthetic Configuration List

The **Anesthetic Configuration List** is where a list of anesthetics approved by the institution for use in animal subject studies is maintained in the iRIS™ system. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Anesthetic Configuration List** link.



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

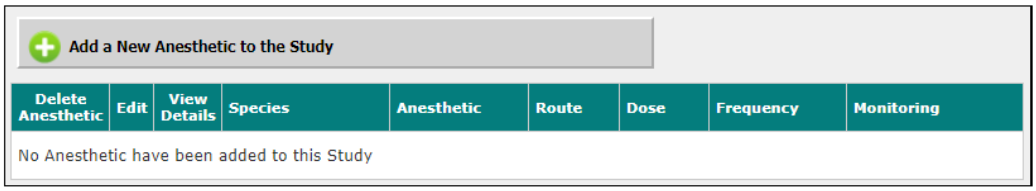


Delete	Edit	Species name	Anesthetic	Route	Dose	Monitor
		Guinea Pig (USDA C)	Ketamine/Midazolam	IV	10 mg/kg + 0.5 mg/kg	Induction at up to 5%; maintenance 0.5-3%
		Mouse (USDA C)	Isoflurane	Inhaled	5 mg/kg	3–5 % during induction, 1.5 – 2.5% maintenance
		Mouse (USDA C)	Nitrous Oxide	Inhaled	.5 mg/kg	1:1 mixture of nitrous to oxygen to augment additional anesthetic regimen

Anesthetic List Implementation – Application Side

The anesthetic list is employed in the following areas on the application side of iRIS™.

IACUC / ARC Study Application — the Anesthetic Configuration List is made available in an IACUC / ARC application via the **Add a New Anesthetic to the Study** button



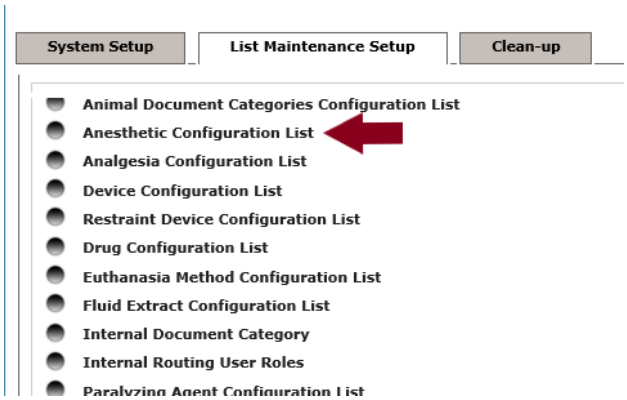
For more information about the IACUC study application, see the iRIS™ IACUC Assistant - IACUC Assistant Manual.

Anesthetic List Implementation – Board Side

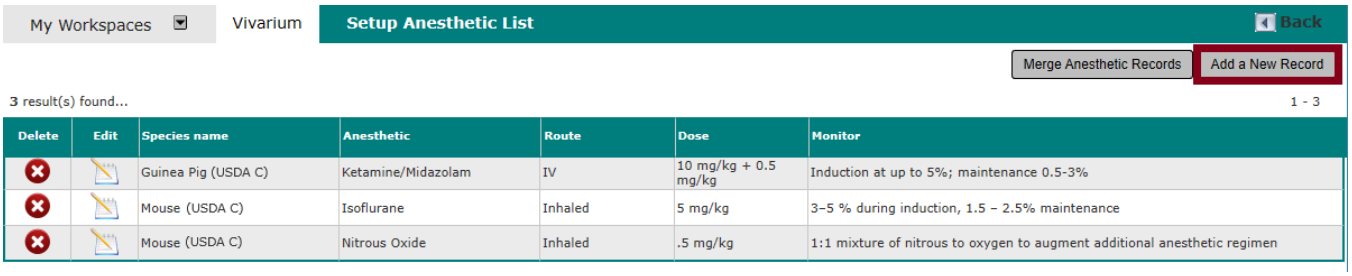
Anesthetics are added on the application side where required and are not generally subject to direct revision by the board.

Add Anesthetic

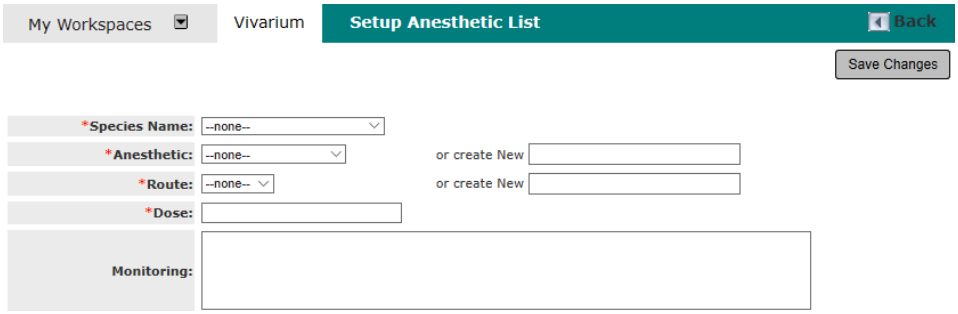
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Anesthetic Configuration List** link.



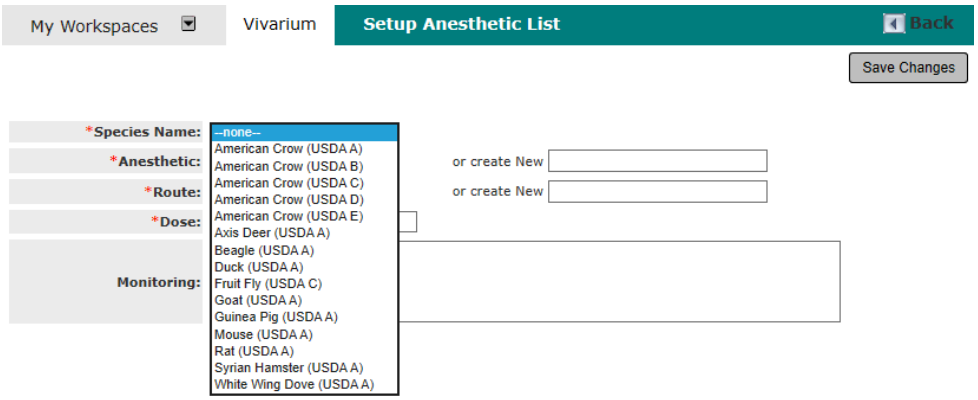
The **Setup Anesthetic List** page is opened. Click the **Add a New Record** button.



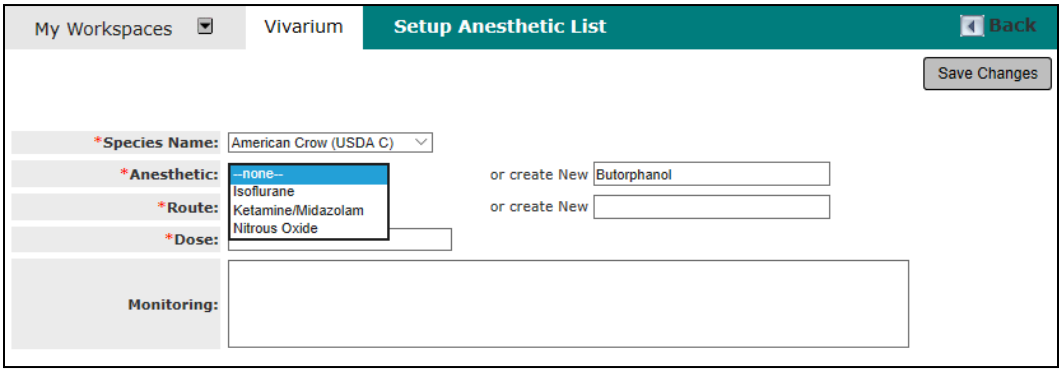
An add panel is opened.



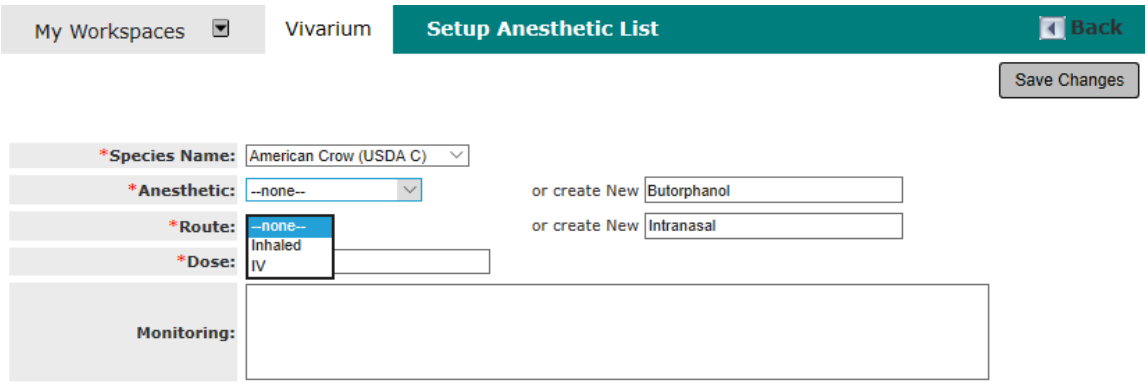
Click on the **Species Name** dropdown list to open it and select the desired species.



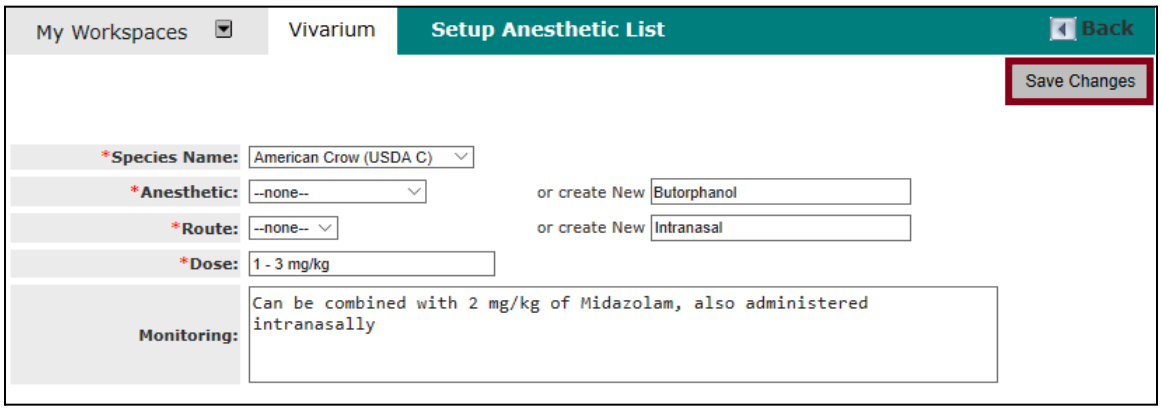
Click on the **Anesthetic** dropdown list to open it. If the desired item is not in the list, manually enter it in the **or create New** field directly to the right of the dropdown list.



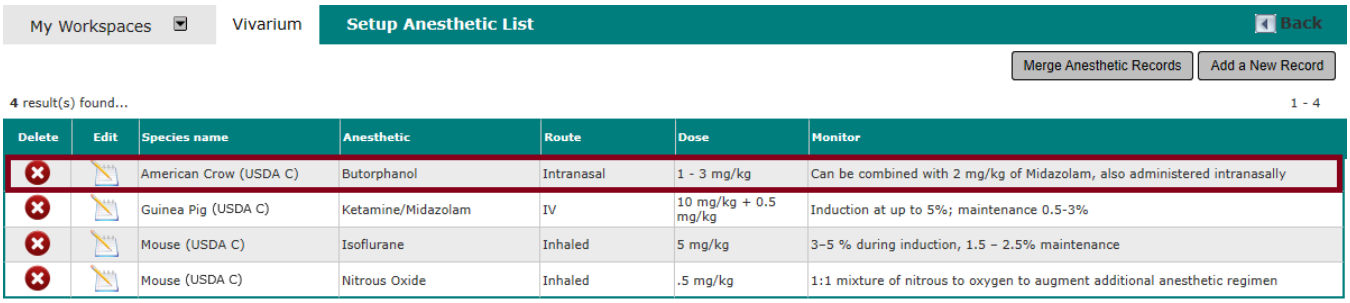
Click on the **Route** dropdown list to open it. If the desired item is not in the list, manually enter it in the **or create New** field directly to the right of the dropdown list.



Enter **Dose** and **Monitoring** details, then click the **Save Changes** button to save the record and close the add panel.

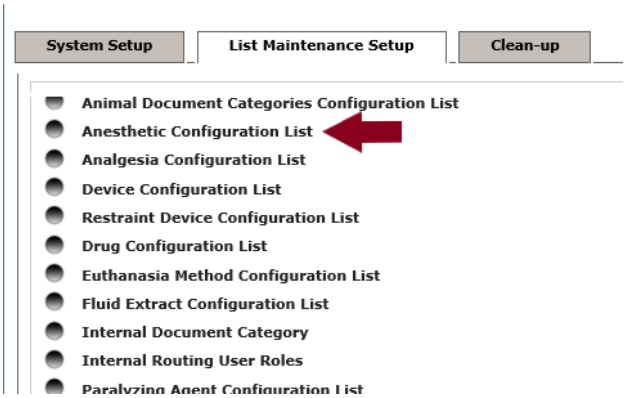


The new record is added.



Edit Anesthetic

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Anesthetic Configuration List** link.



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

My Workspaces | Vivarium | **Setup Anesthetic List** | Back

Merge Anesthetic Records | Add a New Record

4 result(s) found... 1 - 4

Delete	Edit	Species name	Anesthetic	Route	Dose	Monitor
		American Crow (USDA C)	Butorphanol	Intranasal	1 - 3 mg/kg	Can be combined with 2 mg/kg of Midazolam, also administered intranasally
		Guinea Pig (USDA C)	Ketamine/Midazolam	IV	10 mg/kg + 0.5 mg/kg	Induction at up to 5%; maintenance 0.5-3%
		Mouse (USDA C)	Isoflurane	Inhaled	5 mg/kg	3–5 % during induction, 1.5 – 2.5% maintenance
		Mouse (USDA C)	Nitrous Oxide	Inhaled	.5 mg/kg	1:1 mixture of nitrous to oxygen to augment additional anesthetic regimen

Click the icon in the **Edit** column for the applicable record. The record is opened in an edit panel.

My Workspaces | Vivarium | **Setup Anesthetic List** | Back

Save Changes

*Species Name: Mouse

*Anesthetic: Nitrous Oxide or create New

*Route: Inhaled or create New

*Dose: .5 mg/kg

Monitoring: 1:1 mixture of nitrous to oxygen to augment primary anesthetic

Make desired changes to the record, then click the **Save Changes** button to save changes and close the edit panel. The record is revised on the **Setup Anesthetic List** page.

My Workspaces | Vivarium | **Setup Anesthetic List** | Back

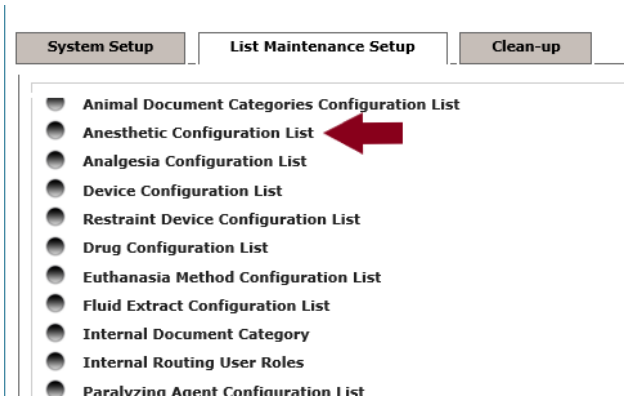
Merge Anesthetic Records | Add a New Record

4 result(s) found... 1 - 4

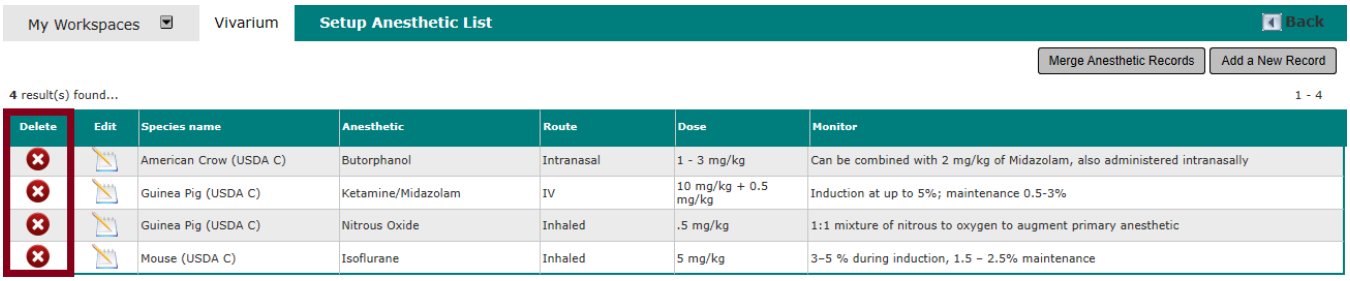
Delete	Edit	Species name	Anesthetic	Route	Dose	Monitor
		American Crow (USDA C)	Butorphanol	Intranasal	1 - 3 mg/kg	Can be combined with 2 mg/kg of Midazolam, also administered intranasally
		Guinea Pig (USDA C)	Ketamine/Midazolam	IV	10 mg/kg + 0.5 mg/kg	Induction at up to 5%; maintenance 0.5-3%
		Mouse (USDA C)	Isoflurane	Inhaled	5 mg/kg	3–5 % during induction, 1.5 – 2.5% maintenance
		Mouse (USDA C)	Nitrous Oxide	Inhaled	.5 mg/kg	1:1 mixture of nitrous to oxygen to augment primary anesthetic

Delete Anesthetic

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Anesthetic Configuration List** link.

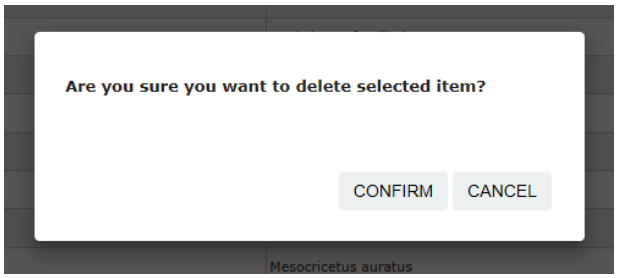


The **Setup Anesthetic List** page is opened.



Delete	Edit	Species name	Anesthetic	Route	Dose	Monitor
		American Crow (USDA C)	Butorphanol	Intranasal	1 - 3 mg/kg	Can be combined with 2 mg/kg of Midazolam, also administered intranasally
		Guinea Pig (USDA C)	Ketamine/Midazolam	IV	10 mg/kg + 0.5 mg/kg	Induction at up to 5%; maintenance 0.5-3%
		Guinea Pig (USDA C)	Nitrous Oxide	Inhaled	.5 mg/kg	1:1 mixture of nitrous to oxygen to augment primary anesthetic
		Mouse (USDA C)	Isoflurane	Inhaled	5 mg/kg	3–5 % during induction, 1.5 – 2.5% maintenance

Click the icon in the **Delete** column for the applicable record. A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record and return to the **Setup Anesthetic List** page.

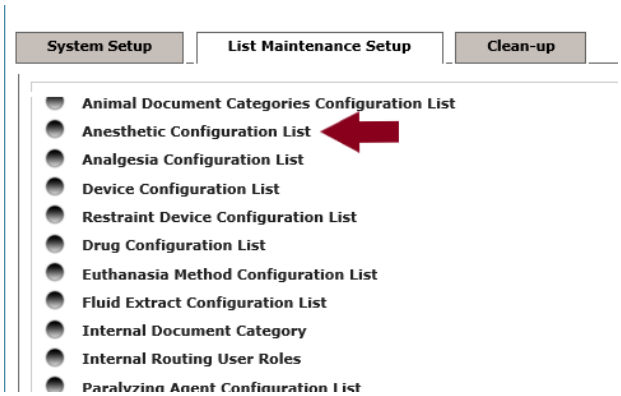
Click **CONFIRM** to complete deletion of the record and return to the **Setup Anesthetic List** page.

Merge Anesthetic Records

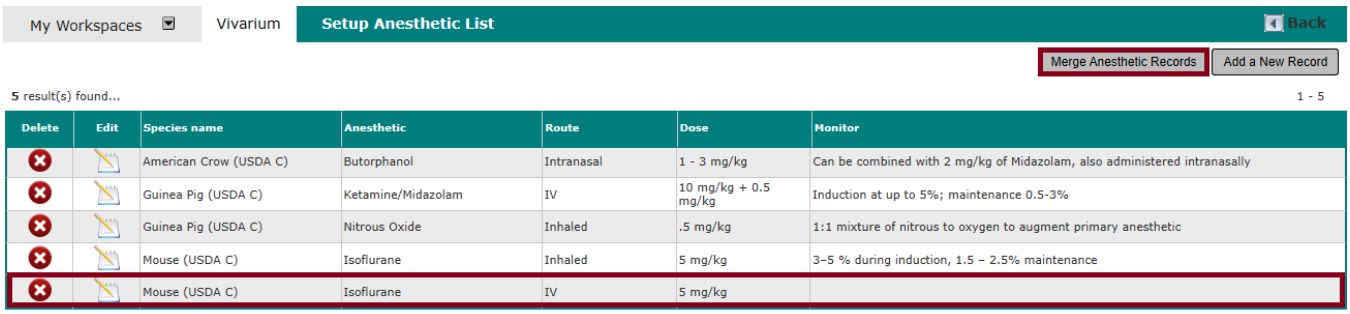
Sometimes a duplicate or erroneous anesthetic record is created and then assigned to one or more study applications before the mistake is caught.

In that situation, the duplicate or erroneous record can be merged with a valid record. The valid record is then substituted for the duplicate/erroneous record previously assigned to study applications.

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Anesthetic Configuration List** link.

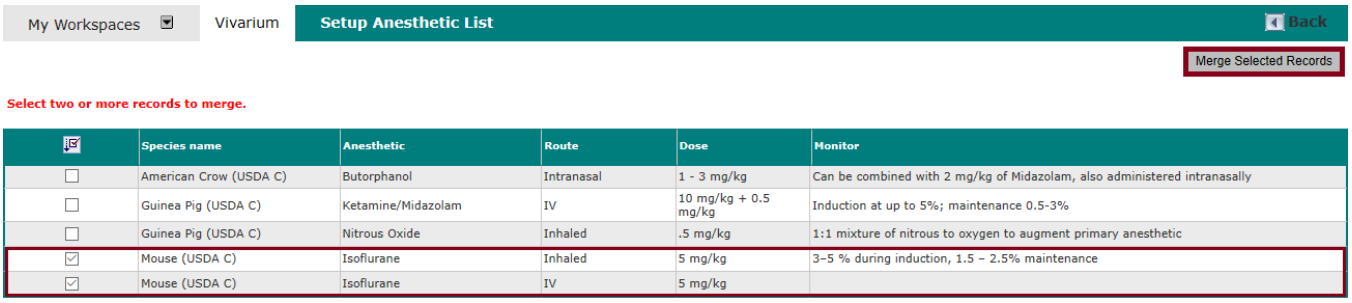


The **Setup Anesthetic List** page is opened. Click the **Merge Anesthetic Records** button.



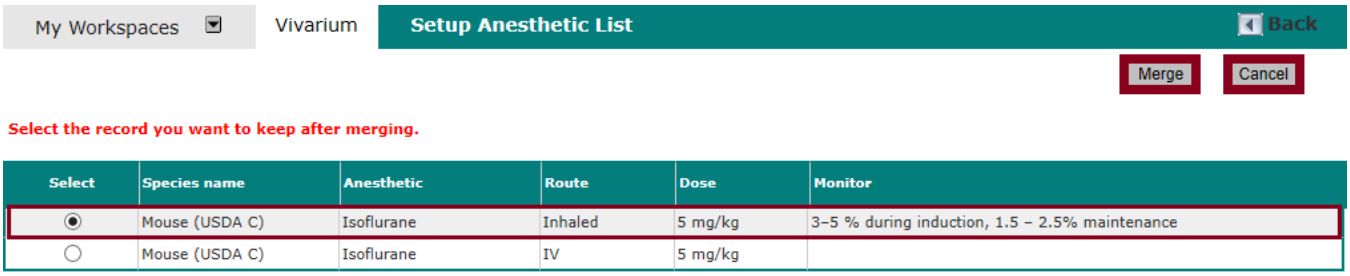
Delete	Edit	Species name	Anesthetic	Route	Dose	Monitor
		American Crow (USDA C)	Butorphanol	Intranasal	1 - 3 mg/kg	Can be combined with 2 mg/kg of Midazolam, also administered intranasally
		Guinea Pig (USDA C)	Ketamine/Midazolam	IV	10 mg/kg + 0.5 mg/kg	Induction at up to 5%; maintenance 0.5-3%
		Guinea Pig (USDA C)	Nitrous Oxide	Inhaled	.5 mg/kg	1:1 mixture of nitrous to oxygen to augment primary anesthetic
		Mouse (USDA C)	Isoflurane	Inhaled	5 mg/kg	3–5 % during induction, 1.5 – 2.5% maintenance
		Mouse (USDA C)	Isoflurane	IV	5 mg/kg	

In the example shown above, the second "Isoflurane" record was created in error, with an invalid **Route** of administration. This record may have been assigned to one or more studies and must be merged with the valid record. Click the **Merge Anesthetic Records** button to begin. A merge panel opens.



	Species name	Anesthetic	Route	Dose	Monitor
☐	American Crow (USDA C)	Butorphanol	Intranasal	1 - 3 mg/kg	Can be combined with 2 mg/kg of Midazolam, also administered intranasally
☐	Guinea Pig (USDA C)	Ketamine/Midazolam	IV	10 mg/kg + 0.5 mg/kg	Induction at up to 5%; maintenance 0.5-3%
☐	Guinea Pig (USDA C)	Nitrous Oxide	Inhaled	.5 mg/kg	1:1 mixture of nitrous to oxygen to augment primary anesthetic
☑	Mouse (USDA C)	Isoflurane	Inhaled	5 mg/kg	3–5 % during induction, 1.5 – 2.5% maintenance
☑	Mouse (USDA C)	Isoflurane	IV	5 mg/kg	

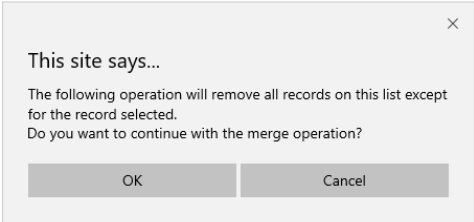
Select the checkboxes at far left for the records to be merged and click the **Merge Selected Records** button. A new panel opens with only the selected records listed.



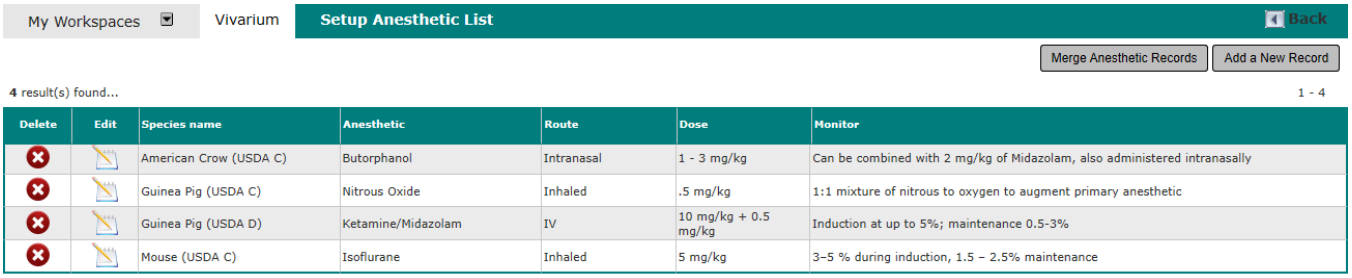
Select	Species name	Anesthetic	Route	Dose	Monitor
◉	Mouse (USDA C)	Isoflurane	Inhaled	5 mg/kg	3–5 % during induction, 1.5 – 2.5% maintenance
○	Mouse (USDA C)	Isoflurane	IV	5 mg/kg	

Click the **Cancel** button to close the panel without merging the records.

Note the red instruction text above the table: select the radio button at far left for the record to be KEPT, then click the **Merge** button. A confirmation popup window appears.



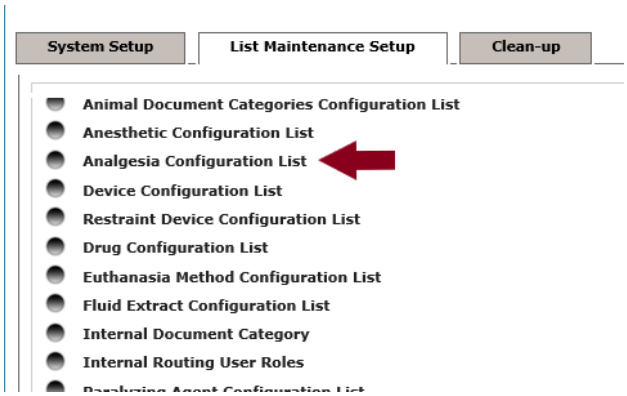
As the popup states, all records on the list will be deleted except for the selected record. Click **Cancel** to close the popup without merging the records. Click **OK** to complete the merge and return to the **Setup Anesthetic List** page, where the merge can be confirmed.



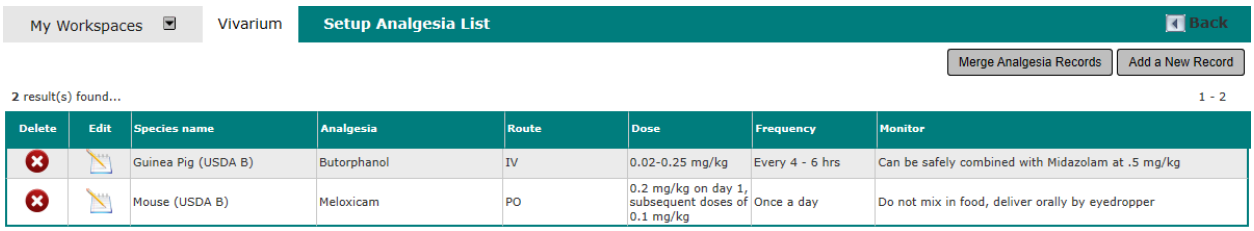
Delete	Edit	Species name	Anesthetic	Route	Dose	Monitor
✖		American Crow (USDA C)	Butorphanol	Intranasal	1 - 3 mg/kg	Can be combined with 2 mg/kg of Midazolam, also administered intranasally
✖		Guinea Pig (USDA C)	Nitrous Oxide	Inhaled	.5 mg/kg	1:1 mixture of nitrous to oxygen to augment primary anesthetic
✖		Guinea Pig (USDA D)	Ketamine/Midazolam	IV	10 mg/kg + 0.5 mg/kg	Induction at up to 5%; maintenance 0.5-3%
✖		Mouse (USDA C)	Isoflurane	Inhaled	5 mg/kg	3–5 % during induction, 1.5 – 2.5% maintenance

Analgesia Configuration List

The **Analgesia Configuration List** is where a list of analgesics approved by the institution for use in animal subject studies is maintained in the iRIS™ system. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Analgesia Configuration List** link.



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



Delete	Edit	Species name	Analgesia	Route	Dose	Frequency	Monitor
		Guinea Pig (USDA B)	Butorphanol	IV	0.02-0.25 mg/kg	Every 4 - 6 hrs	Can be safely combined with Midazolam at .5 mg/kg
		Mouse (USDA B)	Meloxicam	PO	0.2 mg/kg on day 1, subsequent doses of 0.1 mg/kg	Once a day	Do not mix in food, deliver orally by eyedropper

Analgesia List Implementation – Application Side

The analgesia list is employed in the following areas on the application side of iRIS™.

IACUC / ARC Study Application — the Analgesia Configuration List is made available in an IACUC / ARC application via an **Add a New Analgesia to the Study** button

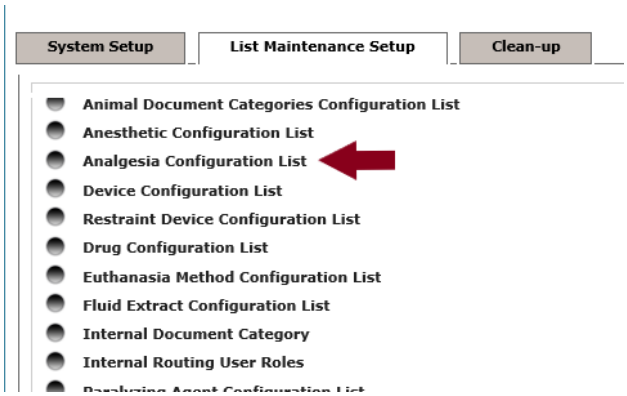
For more information about the IACUC study application, see the iRIS™ IACUC Assistant - IACUC Assistant Manual.

Analgesia List Implementation – Board Side

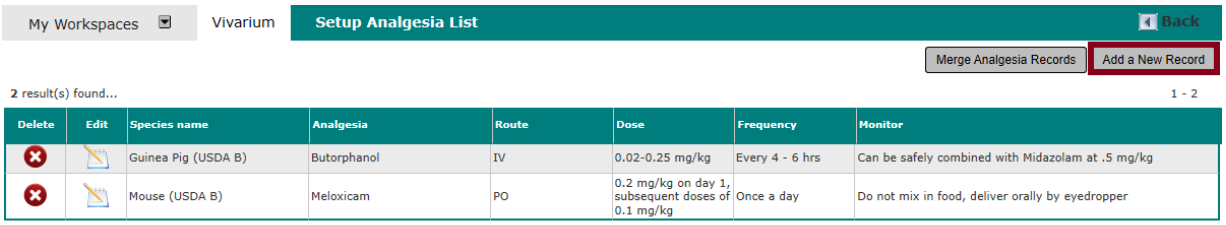
Analgesics are added on the application side where required and are not generally subject to direct revision by the board.

Add Analgesia

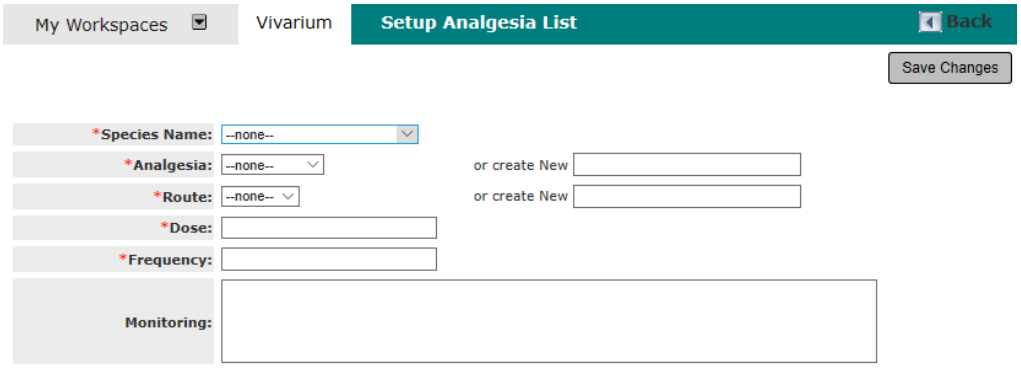
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Analgesia Configuration List** link.



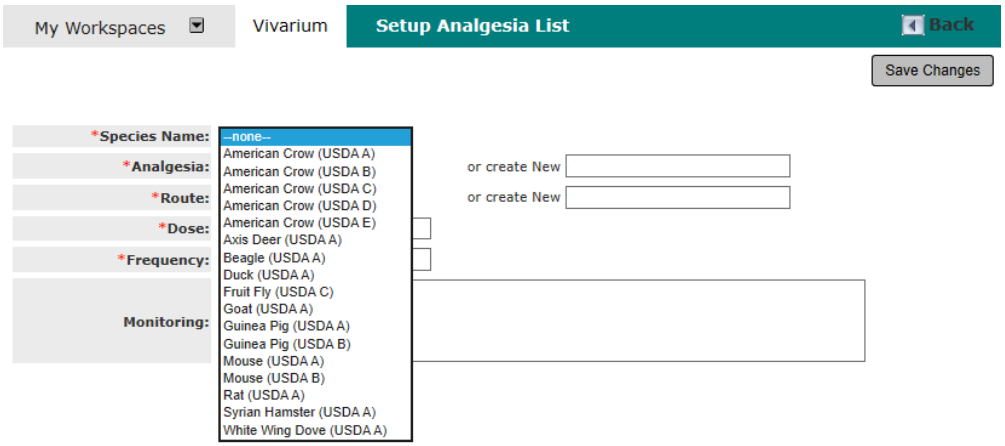
The **Setup Analgesia List** page is opened.



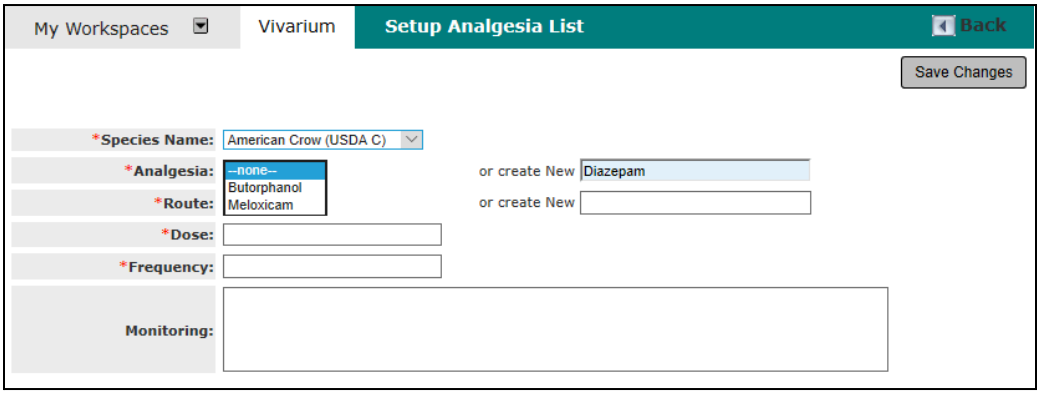
Click the **Add a New Record** button. An add panel is opened.



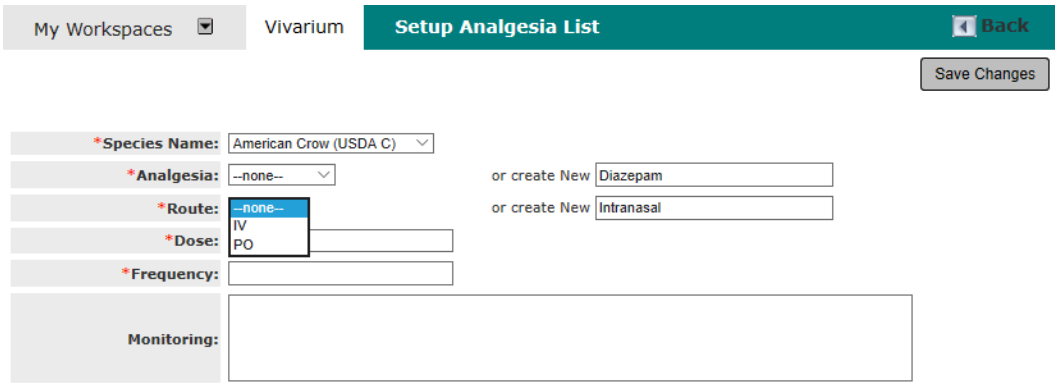
Click on the **Species Name** dropdown list to open it and select the desired species.



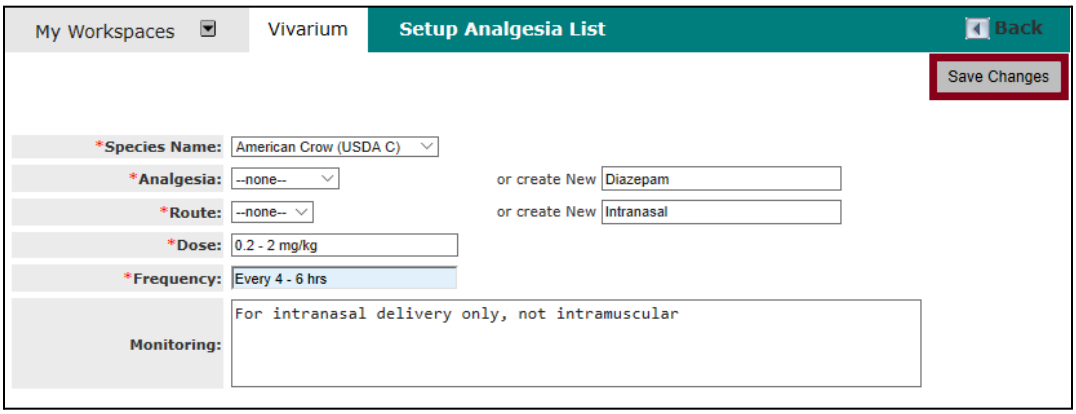
Click on the **Analgesia** dropdown list to open it. If the desired item is not in the list, manually enter it in the **or create New** field directly to the right of the dropdown list.



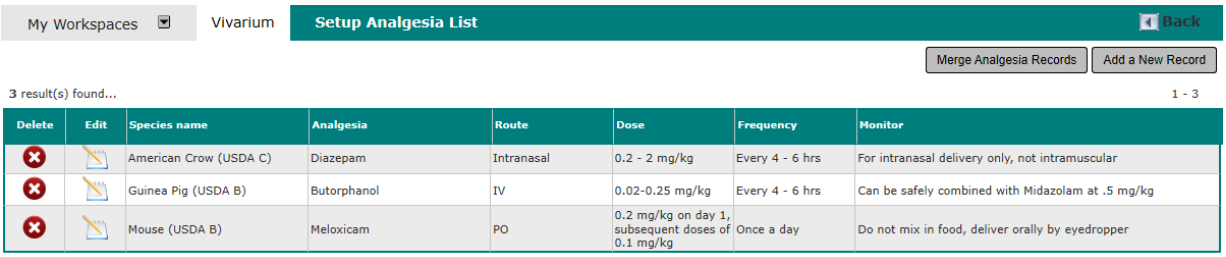
Click on the **Route** dropdown list to open it. If the desired item is not in the list, manually enter it in the **or create New** field directly to the right of the dropdown list.



Enter **Dose** and **Monitoring** details, then click the **Save Changes** button to save the record and close the add panel.



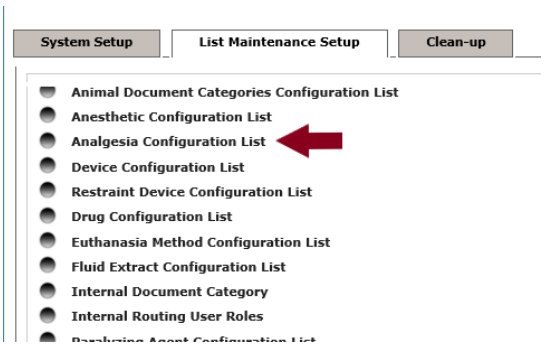
The record is added to the **Setup Analgesia List** page.



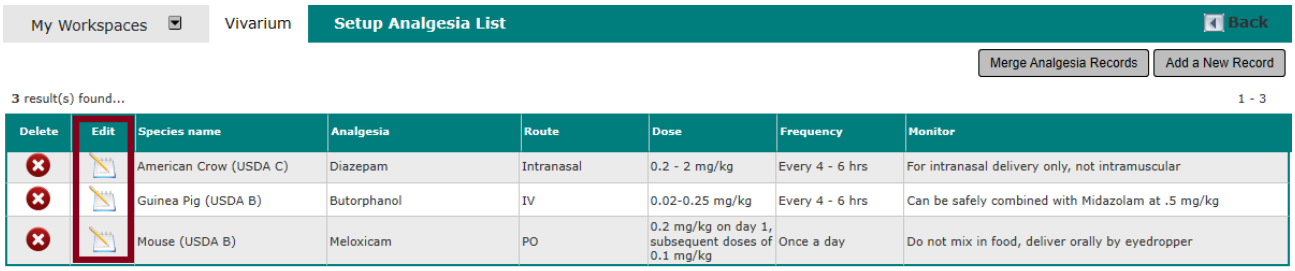
Delete	Edit	Species name	Analgesia	Route	Dose	Frequency	Monitor
		American Crow (USDA C)	Diazepam	Intranasal	0.2 - 2 mg/kg	Every 4 - 6 hrs	For intranasal delivery only, not intramuscular
		Guinea Pig (USDA B)	Butorphanol	IV	0.02-0.25 mg/kg	Every 4 - 6 hrs	Can be safely combined with Midazolam at .5 mg/kg
		Mouse (USDA B)	Meloxicam	PO	0.2 mg/kg on day 1, subsequent doses of 0.1 mg/kg	Once a day	Do not mix in food, deliver orally by eyedropper

Edit Analgesia

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Analgesia Configuration List** link.

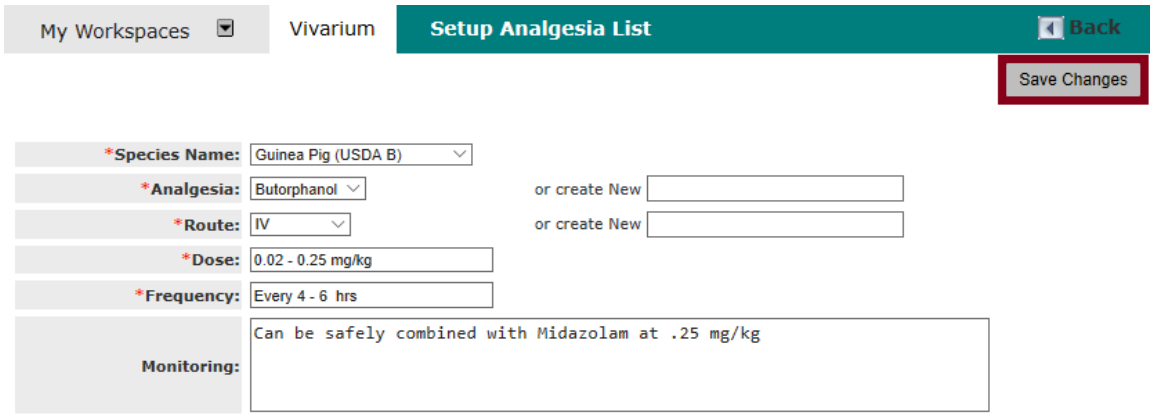


The **Setup Analgesia List** page is opened.

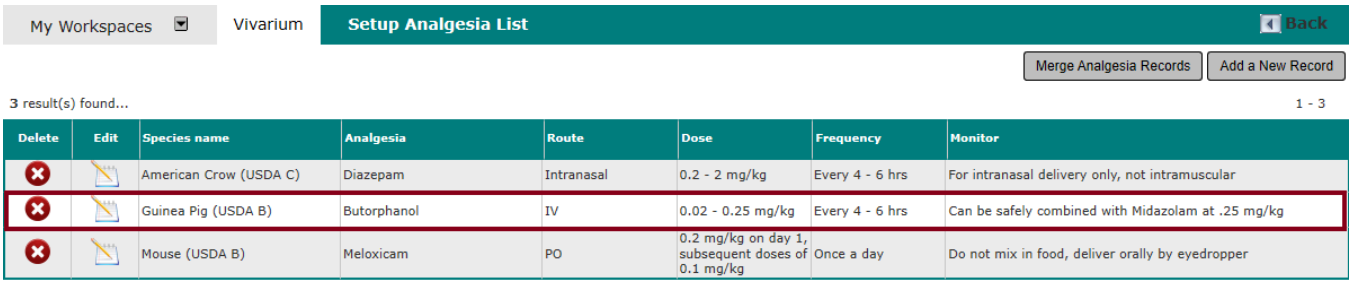


Delete	Edit	Species name	Analgesia	Route	Dose	Frequency	Monitor
		American Crow (USDA C)	Diazepam	Intranasal	0.2 - 2 mg/kg	Every 4 - 6 hrs	For intranasal delivery only, not intramuscular
		Guinea Pig (USDA B)	Butorphanol	IV	0.02-0.25 mg/kg	Every 4 - 6 hrs	Can be safely combined with Midazolam at .5 mg/kg
		Mouse (USDA B)	Meloxicam	PO	0.2 mg/kg on day 1, subsequent doses of 0.1 mg/kg	Once a day	Do not mix in food, deliver orally by eyedropper

Click the icon in the **Edit** column for the applicable record. The record is opened in an edit panel.

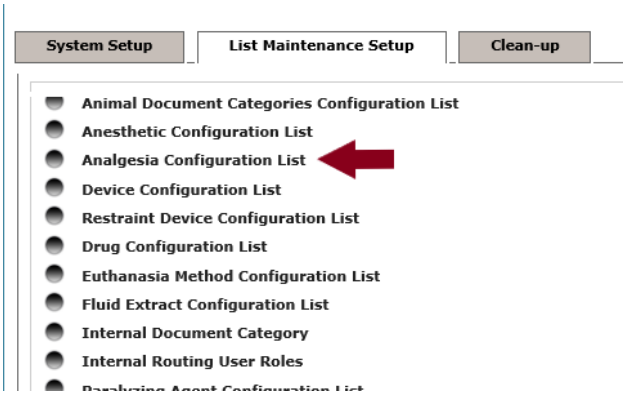


Make desired changes to the record, then click the **Save Changes** button to save changes and close the edit panel. The record is revised on the **Setup Analgesic List** page.

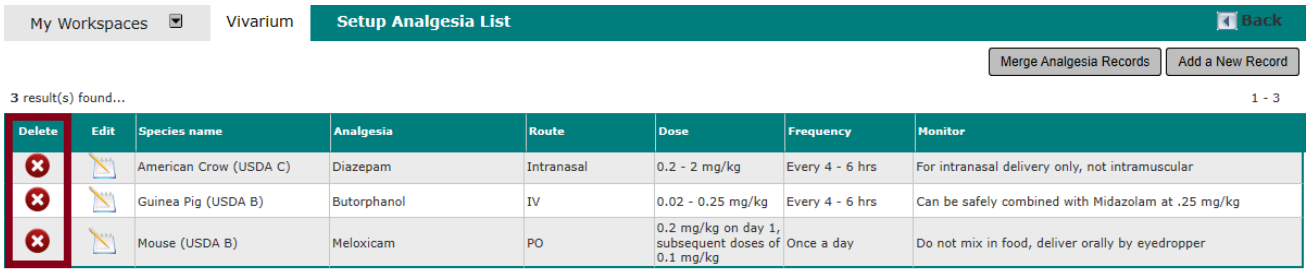


Delete Analgesia

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Analgesia Configuration List** link.

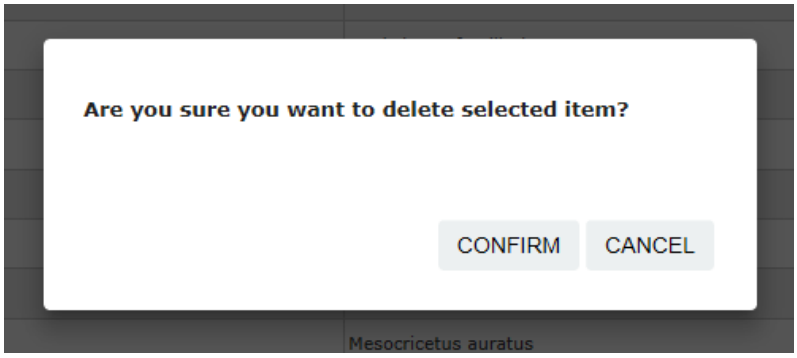


The **Setup Analgesia List** page is opened.



Delete	Edit	Species name	Analgesia	Route	Dose	Frequency	Monitor
		American Crow (USDA C)	Diazepam	Intranasal	0.2 - 2 mg/kg	Every 4 - 6 hrs	For intranasal delivery only, not intramuscular
		Guinea Pig (USDA B)	Butorphanol	IV	0.02 - 0.25 mg/kg	Every 4 - 6 hrs	Can be safely combined with Midazolam at .25 mg/kg
		Mouse (USDA B)	Meloxicam	PO	0.2 mg/kg on day 1, subsequent doses of 0.1 mg/kg	Once a day	Do not mix in food, deliver orally by eyedropper

Click the icon in the **Delete** column for the applicable record. A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record and return to the **Setup Analgesia List** page.

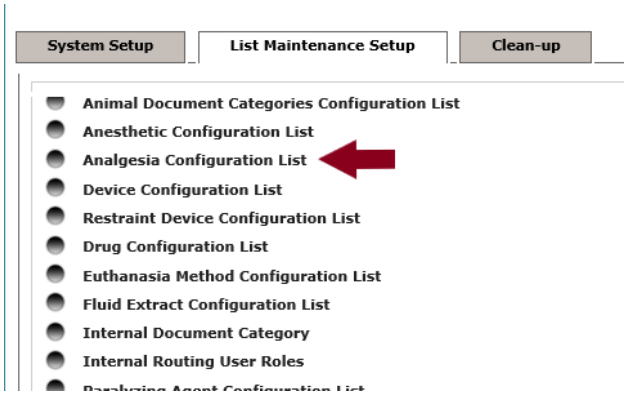
Click **CONFIRM** to complete deletion of the record and return to the **Setup Analgesia List** page.

Merge Analgesia Records

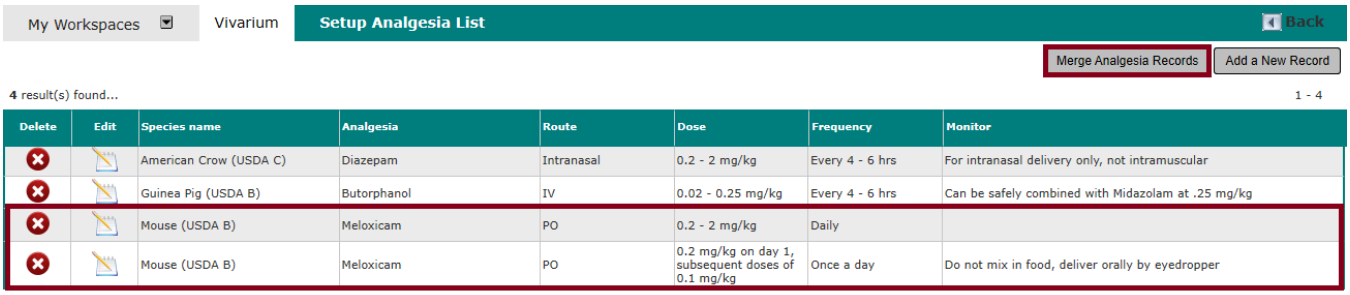
Sometimes a duplicate or erroneous analgesia record is created and then assigned to one or more study applications before the mistake is caught.

In that situation, the duplicate or erroneous record can be merged with a valid record. The valid record is then substituted for the duplicate/erroneous record previously assigned to study applications.

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Analgesia Configuration List** link.

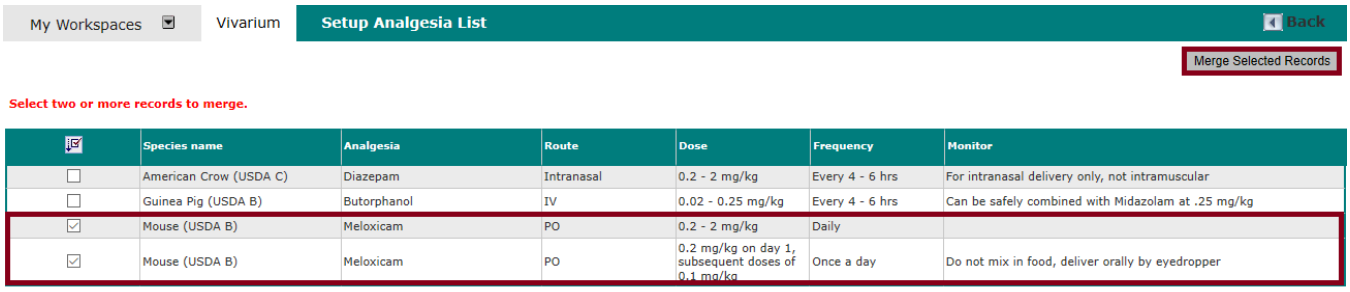


The **Setup Analgesia List** page is opened. Click the **Merge Analgesia Records** button.



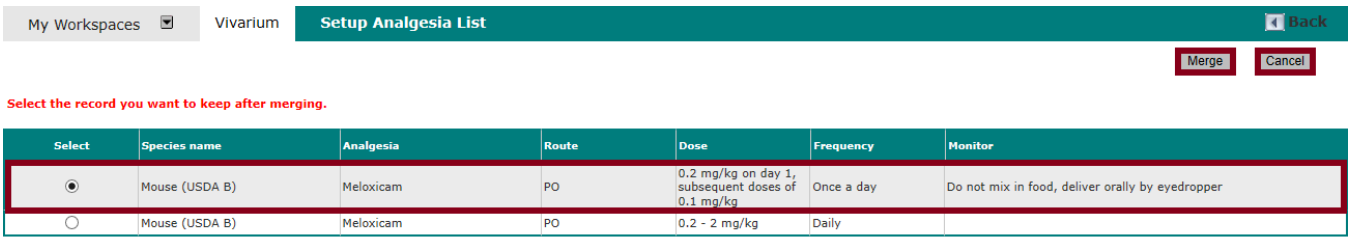
Delete	Edit	Species name	Analgesia	Route	Dose	Frequency	Monitor
		American Crow (USDA C)	Diazepam	Intranasal	0.2 - 2 mg/kg	Every 4 - 6 hrs	For intranasal delivery only, not intramuscular
		Guinea Pig (USDA B)	Butorphanol	IV	0.02 - 0.25 mg/kg	Every 4 - 6 hrs	Can be safely combined with Midazolam at .25 mg/kg
		Mouse (USDA B)	Meloxicam	PO	0.2 - 2 mg/kg	Daily	
		Mouse (USDA B)	Meloxicam	PO	0.2 mg/kg on day 1, subsequent doses of 0.1 mg/kg	Once a day	Do not mix in food, deliver orally by eyedropper

In the example shown above, the first "Meloxicam" record was created in error. This record may have been assigned to one or more studies and must be merged with the valid record. Click the **Merge Analgesia Records** button to begin. A merge panel opens.



	Species name	Analgesia	Route	Dose	Frequency	Monitor
☐	American Crow (USDA C)	Diazepam	Intranasal	0.2 - 2 mg/kg	Every 4 - 6 hrs	For intranasal delivery only, not intramuscular
☐	Guinea Pig (USDA B)	Butorphanol	IV	0.02 - 0.25 mg/kg	Every 4 - 6 hrs	Can be safely combined with Midazolam at .25 mg/kg
☑	Mouse (USDA B)	Meloxicam	PO	0.2 - 2 mg/kg	Daily	
☑	Mouse (USDA B)	Meloxicam	PO	0.2 mg/kg on day 1, subsequent doses of 0.1 mg/kg	Once a day	Do not mix in food, deliver orally by eyedropper

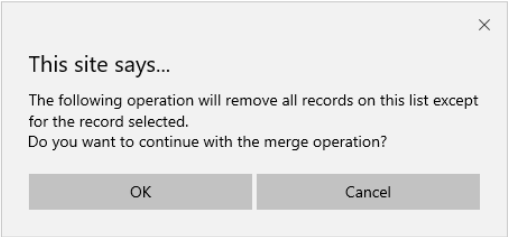
Select the checkboxes at far left for the records to be merged and click the **Merge Selected Records** button. A new panel opens with only the selected records listed.



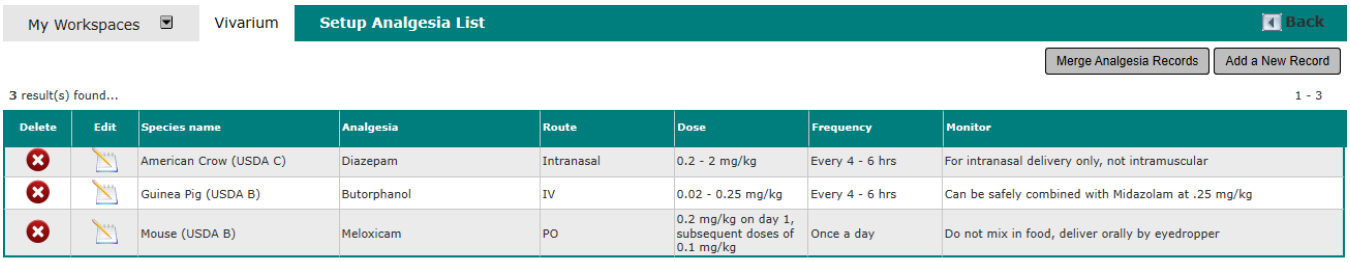
Select	Species name	Analgesia	Route	Dose	Frequency	Monitor
◉	Mouse (USDA B)	Meloxicam	PO	0.2 mg/kg on day 1, subsequent doses of 0.1 mg/kg	Once a day	Do not mix in food, deliver orally by eyedropper
○	Mouse (USDA B)	Meloxicam	PO	0.2 - 2 mg/kg	Daily	

Click the **Cancel** button to close the panel without merging the records.

Note the red instruction text above the table: select the radio button at far left for the record to be KEPT, then click the **Merge** button. A confirmation popup window appears.



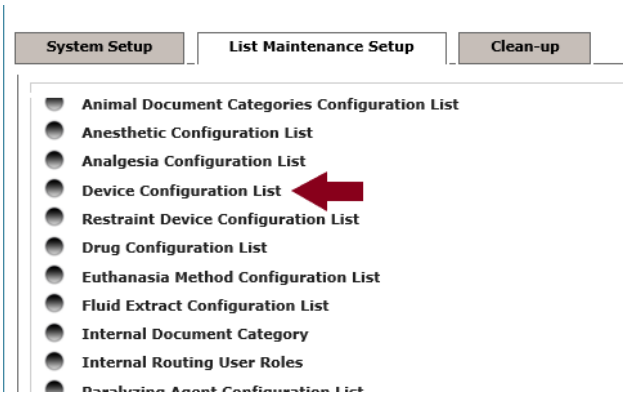
As the popup states, all records on the list will be deleted except for the selected record. Click **Cancel** to close the popup without merging the records. Click **OK** to complete the merge and return to the **Setup Analgesia List** page, where the merge can be confirmed.



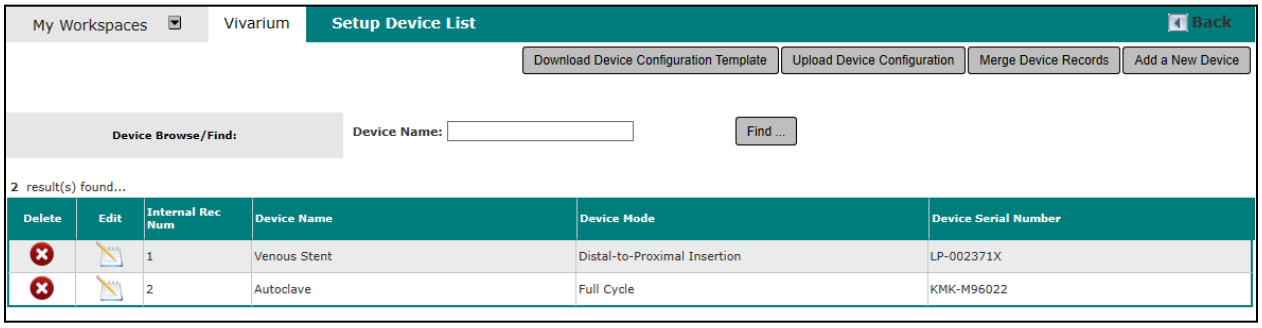
Delete	Edit	Species name	Analgesia	Route	Dose	Frequency	Monitor
		American Crow (USDA C)	Diazepam	Intranasal	0.2 - 2 mg/kg	Every 4 - 6 hrs	For intranasal delivery only, not intramuscular
		Guinea Pig (USDA B)	Butorphanol	IV	0.02 - 0.25 mg/kg	Every 4 - 6 hrs	Can be safely combined with Midazolam at .25 mg/kg
		Mouse (USDA B)	Meloxicam	PO	0.2 mg/kg on day 1, subsequent doses of 0.1 mg/kg	Once a day	Do not mix in food, deliver orally by eyedropper

Device Configuration List

The **Device Configuration List** is where a list of devices approved by the institution for use in animal subject studies is maintained in the iRIS™ system. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Device Configuration List** link.



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

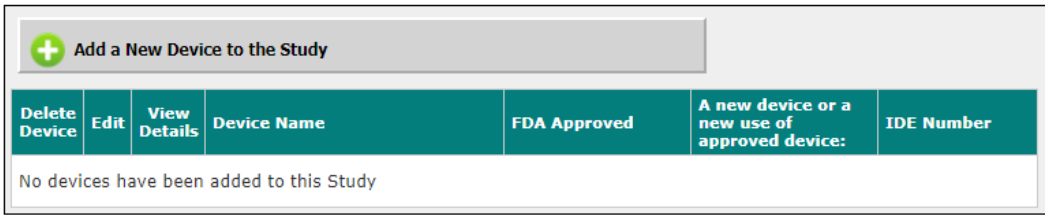


If the device list is lengthy, use the **Device Browse/Find** form above the list to search for records by **Device Name**.

Device List Implementation – Application Side

The device list is employed in the following areas on the application side of iRIS™.

IACUC / ARC Study Application — the Device Configuration List is made available in an IACUC / ARC application via an **Add a New Device to the Study** button



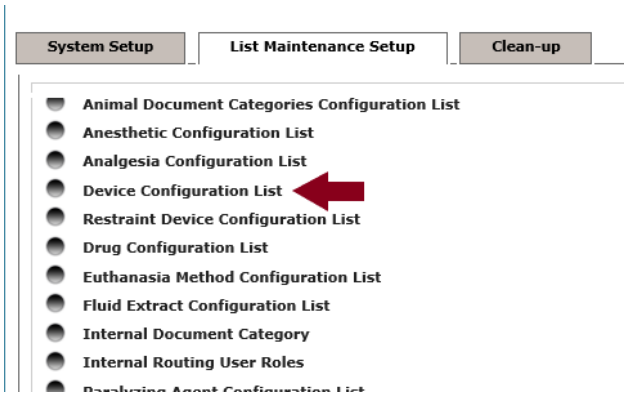
For more information about the IACUC study application, see the iRIS™ IACUC Assistant - IACUC Assistant Manual.

Device List Implementation – Board Side

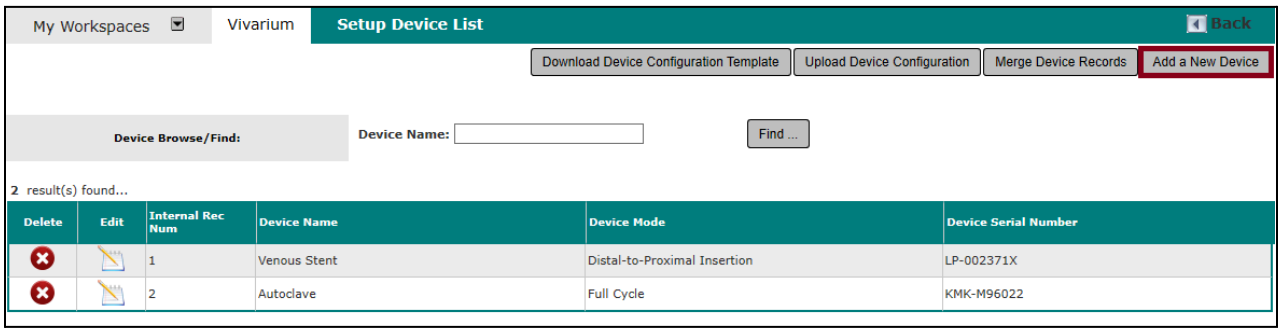
Devices are added on the application side where required and are not generally subject to direct revision by the board.

Add a New Device

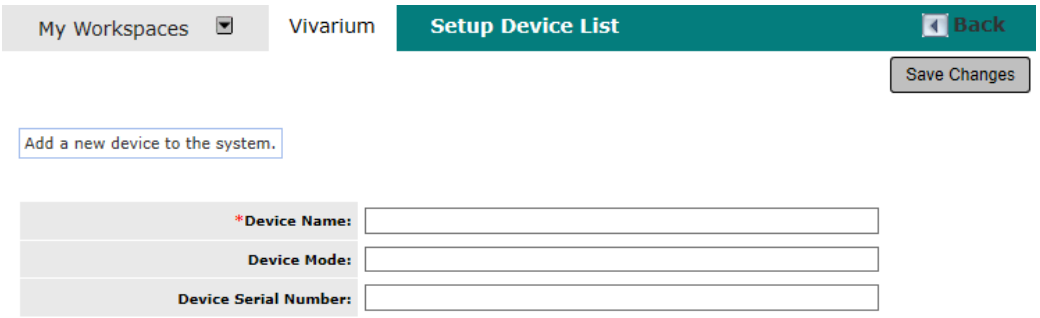
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Device Configuration List** link.



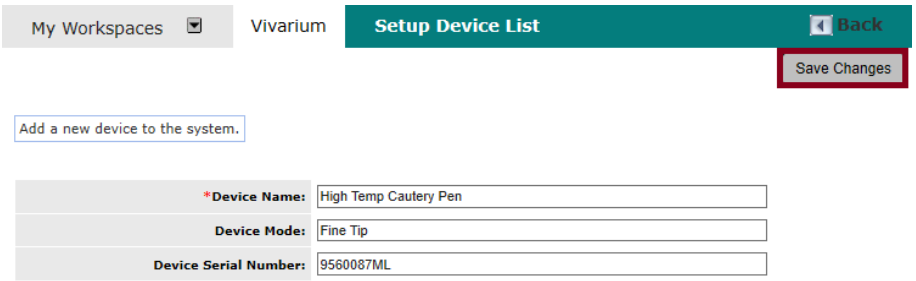
The **Setup Device List** page is opened. Click the **Add a New Device** button.



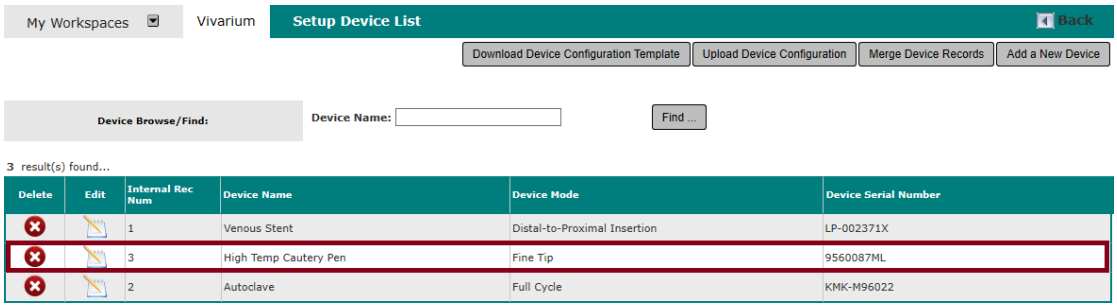
An **Add a new device to the system** panel opens for entry of the new record.



Enter a **Device Name**, **Device Mode** and **Device Serial Number**, then click the **Save Changes** button.

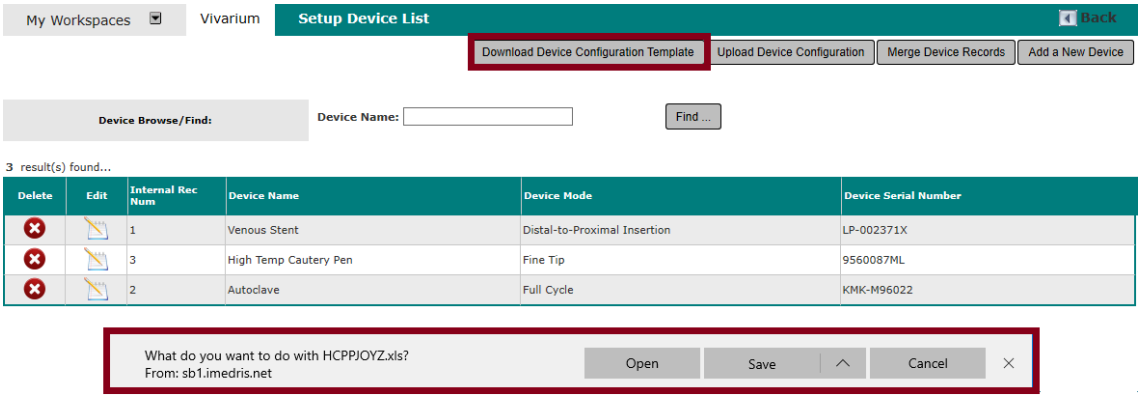


The add panel is closed and the new record is added on the **Setup Device List** page.



Download Device Configuration Template

The iRIS™ system provides a mechanism for adding a large quantity of device records at once, via population and upload of a pre-formatted Excel template. Click the **Download Device Configuration Template** button to begin. A download dialog opens at the bottom of the page.

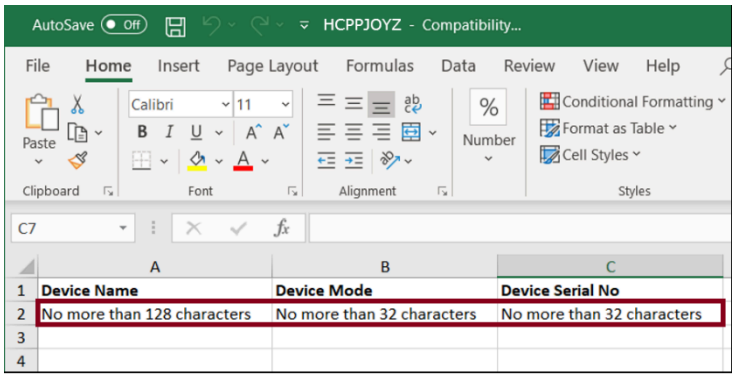


Click the **Cancel** button in the download dialog popup to close it without downloading the template.

Click the **Save** button in the download dialog popup to save the template to the default Downloads folder on the computer. Click the upward-pointing arrow to the right of the **Save** button to access Save As options, which allow for saving the template to the user's desired location on the computer.

The download dialog popup message changes when the download is complete, as shown below.

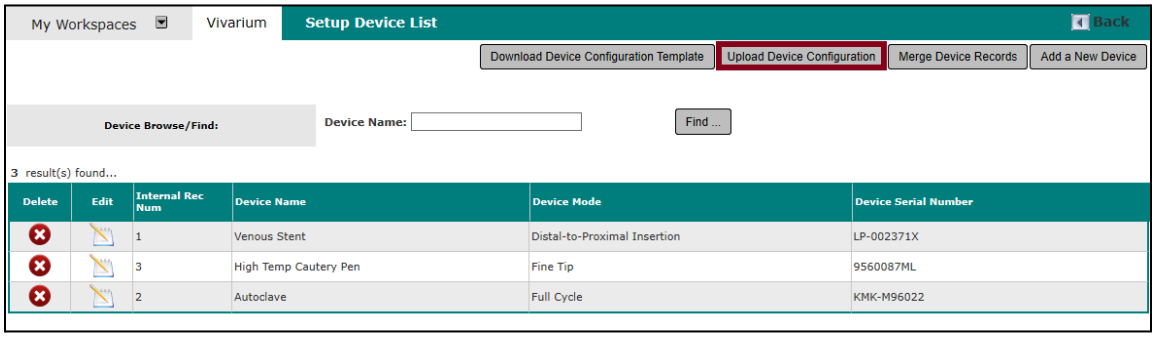
Navigate to the downloaded template file and open it.



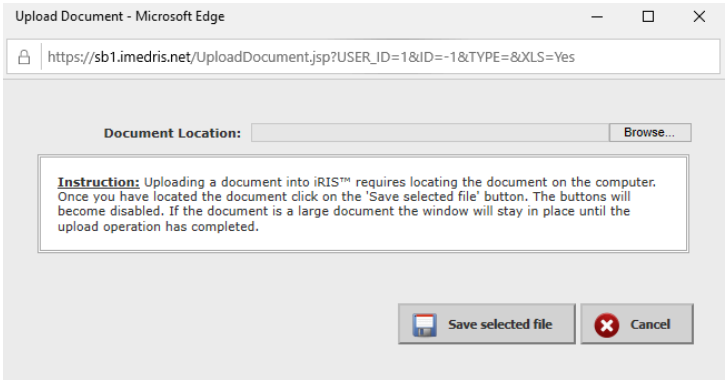
As shown in the screenshot above, field length limits are provided in the second row. Enter desired device records to complete the template and save changes to the file.

Upload Device Configuration Template

When the Device Template has been populated with all desired data, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Device Configuration List** link. The **Setup Device List** page opens. Click the **Upload Device Configuration** button.



An upload dialog popup appears.



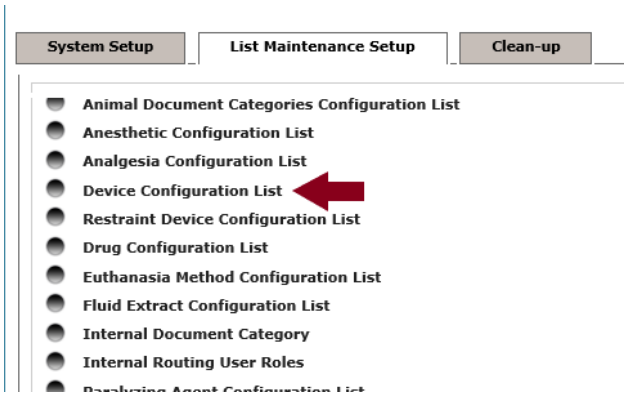
Click the **Cancel** button to close the dialog without completing the upload.

Click the **Browse…** button to navigate to the completed template and select it, then click the **Save selected file** button to complete the upload.

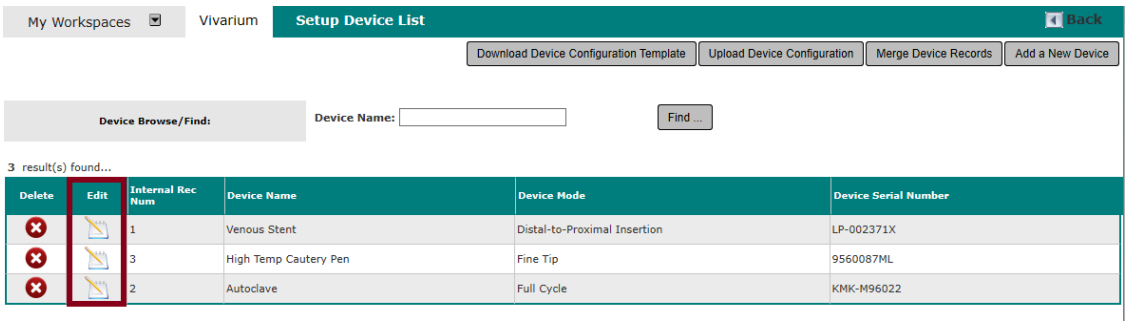
Review the uploaded records in the **Setup Device List** page to ensure the uploaded records have correctly populated all columns. Any records that do not meet data content requirements must be edited or deleted promptly, to ensure they cannot be mistakenly assigned to studies.

Edit Device

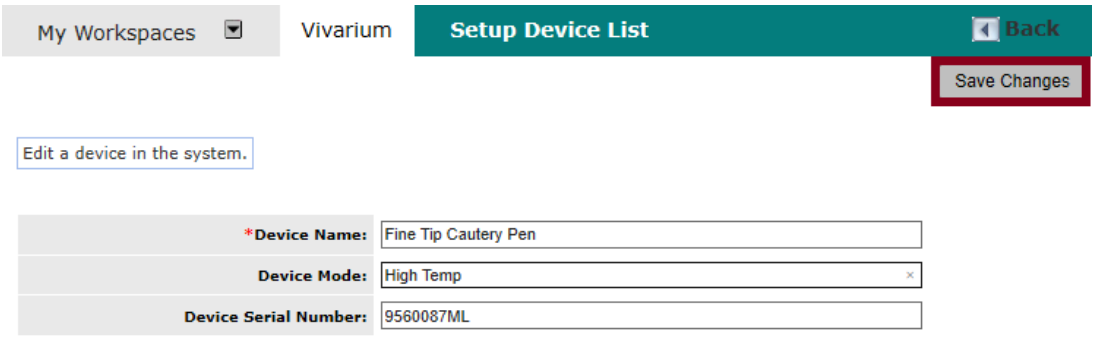
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Device Configuration List** link.



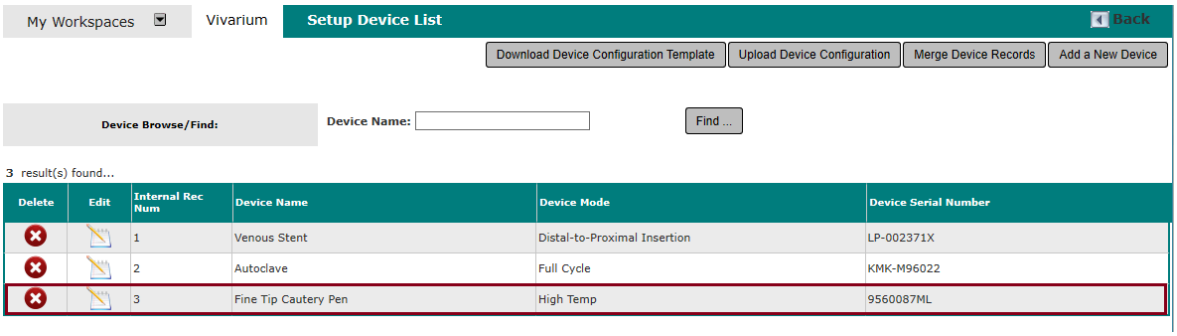
The **Setup Device List** page is opened. Click the icon in the **Edit** column for the applicable record.



The record is opened in an **Edit a device in the system** panel. Make desired changes and click the **Save Changes** button.

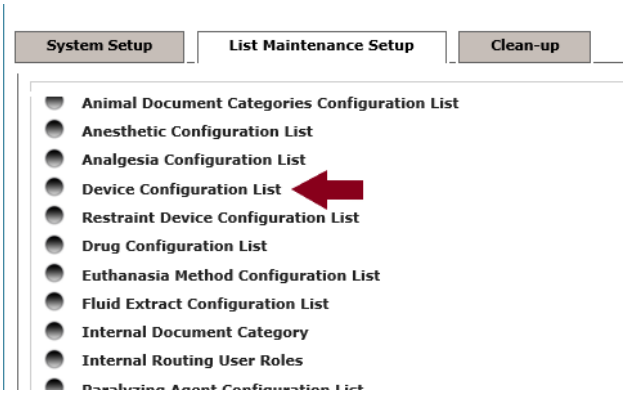


The edit panel is closed and the record is revised on the **Setup Device List** page.

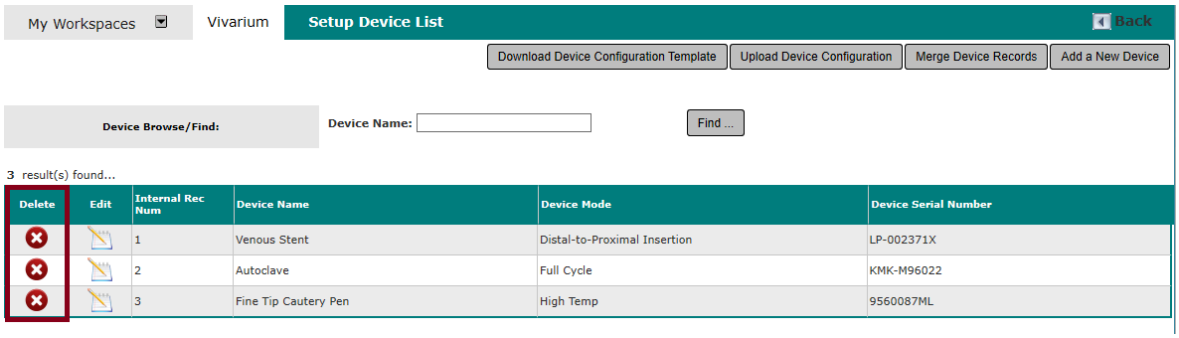


Delete Device

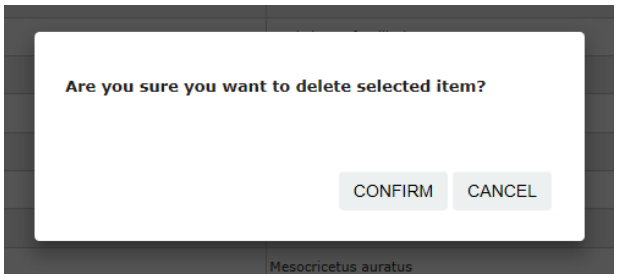
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Device Configuration List** link.



The **Setup Device List** page is opened. Click the icon in the **Delete** column for the applicable record.



A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record and return to the **Setup Device List** page.

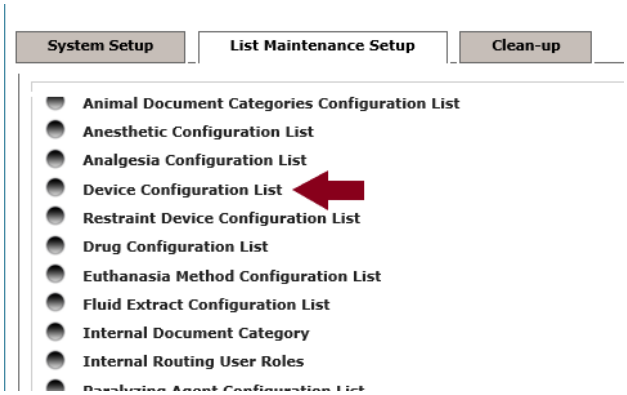
Click **CONFIRM** to complete deletion of the record and return to the **Setup Device List** page.

Merge Device Records

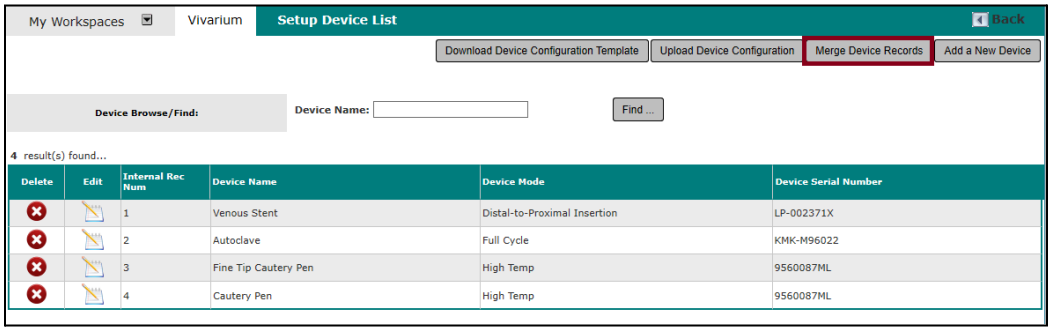
Sometimes a duplicate or erroneous device record is created and then assigned to one or more study applications before the mistake is caught.

In that situation, the duplicate or erroneous device record can be merged with a valid device record. The valid device record is then substituted for the duplicate/erroneous device record previously assigned to study applications.

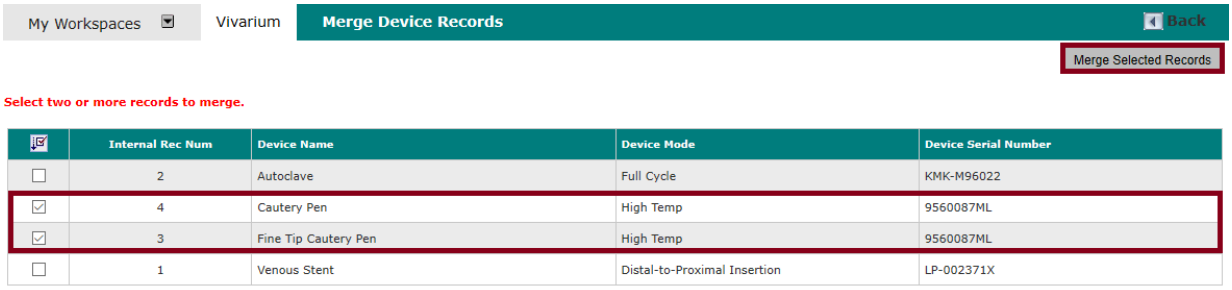
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Device Configuration List** link.



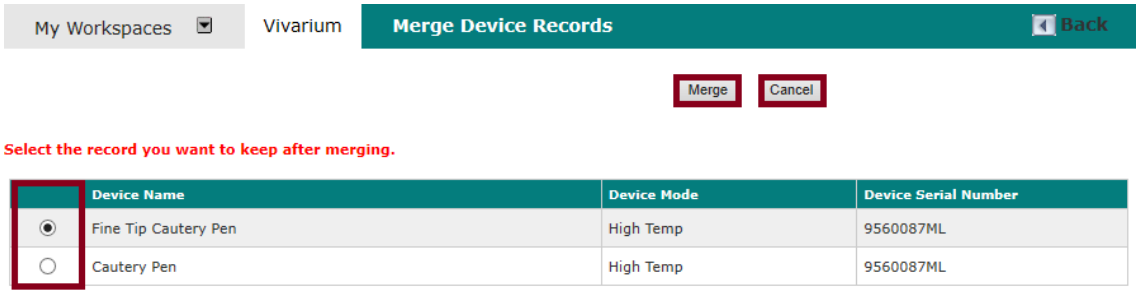
The **Setup Device List** page is opened.



In the example shown above, the second "Cautery Pen" device record in the list was created in error but may have been assigned to one or more studies. Click the **Merge Device Records** button to begin. The **Merge Device Records** page opens.

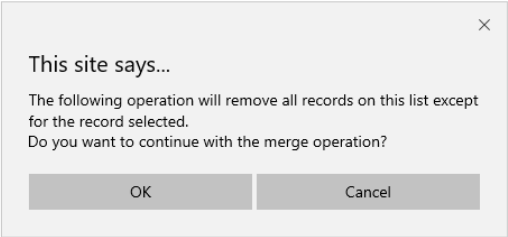


Select the checkboxes at far left for the device records to be merged and click the **Merge Selected Records** button. A new panel opens with only the selected records listed.

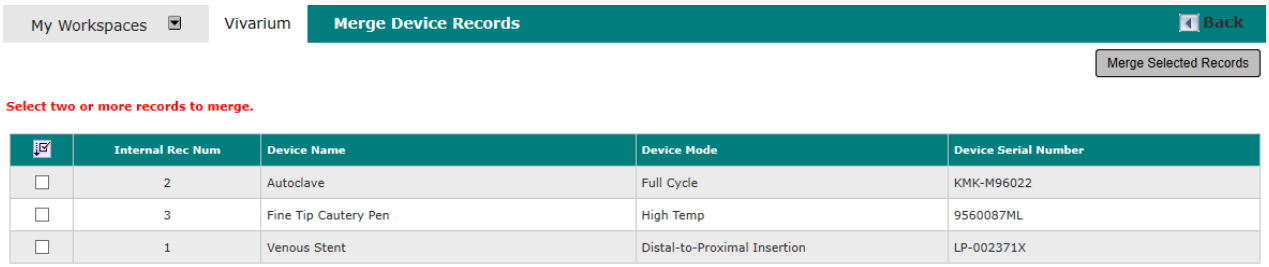


Click the **Cancel** button to close the panel without merging the records.

Note the red instruction text above the table: select the radio button at far left for the record to be KEPT, then click the **Merge** button. A confirmation popup window appears.

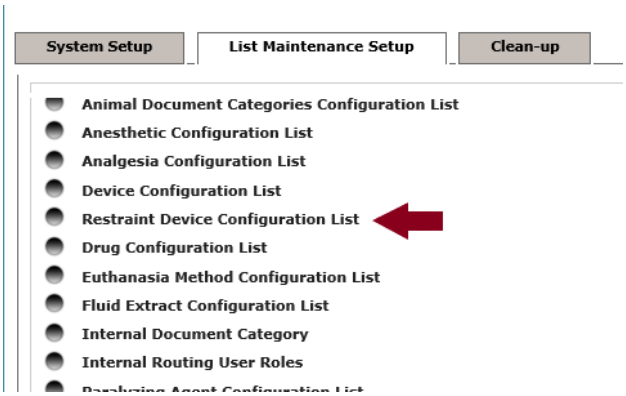


As the popup states, all records on the list will be deleted except for the selected record. Click **Cancel** to close the popup without merging the records. Click **OK** to complete the merge and return to the **Merge Device Records** page, where the merge can be confirmed.

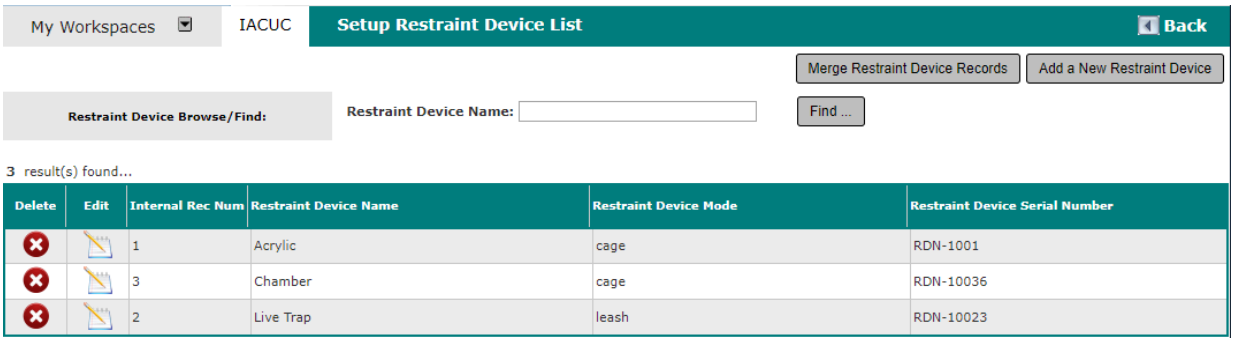


Restraint Device Configuration List

The **Restraint Device Configuration List** is where a list of humane restraint devices approved by the institution for use in animal subject studies is maintained in the iRIS™ system. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Restraint Device Configuration List** link.



The **Setup Restraint Device List** page is opened.

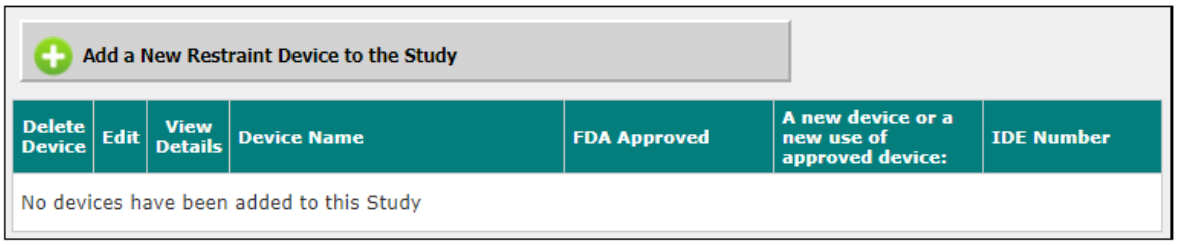


If the restraint device list is lengthy, use the **Restraint Device Browse/Find** section above the list to search for records by **Restraint Device Name**.

Restraint Device List Implementation – Application Side

The restraint device list is employed in the following areas on the application side of iRIS™.

IACUC / ARC Study Application — the Restraint Device List is made available in an IACUC / ARC application via an **Add a New Restraint Device to the Study** button



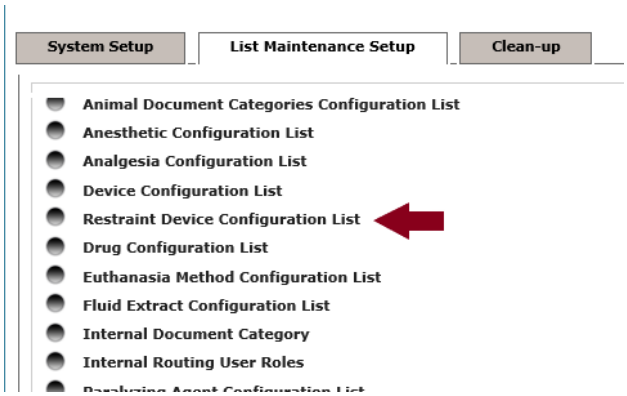
For more information about the IACUC study application, see the iRIS™ IACUC Assistant - IACUC Assistant Manual.

Restraint Device List Implementation – Board Side

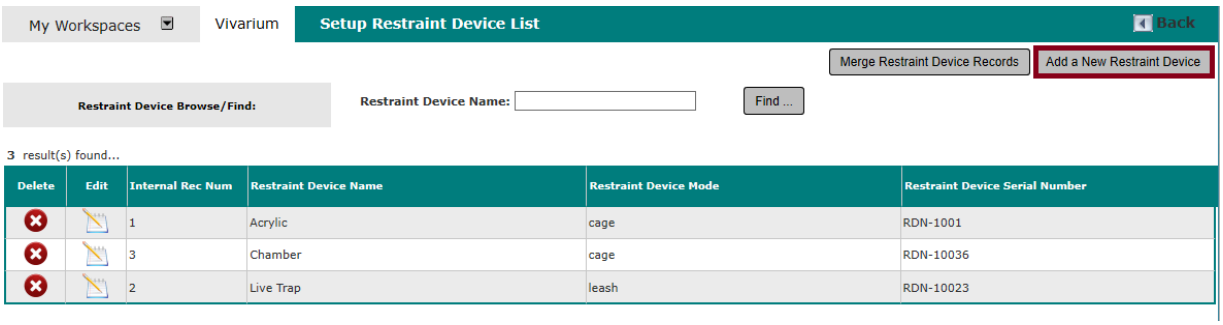
Restraint devices are added on the application side where required and are not generally subject to direct revision by the board.

Add a New Restraint Device

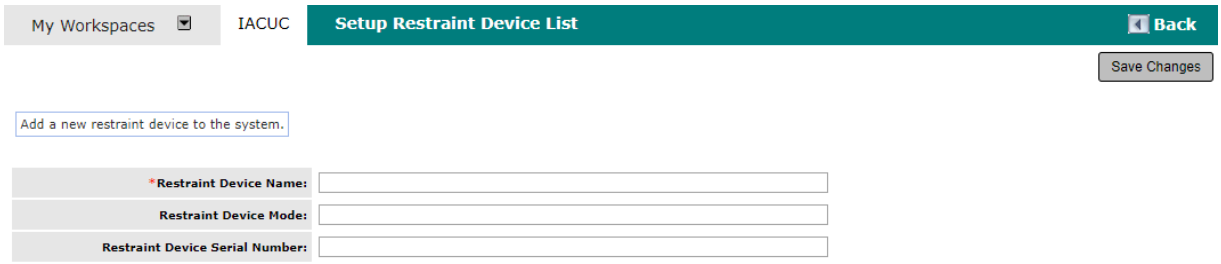
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Restraint Device Configuration List** link.



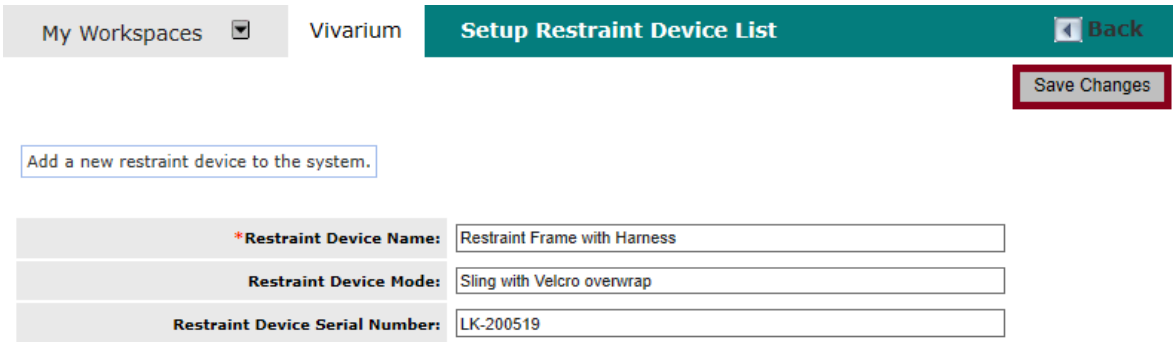
The **Setup Restraint Device List** page is opened. Click the **Add a New Restraint Device** button.



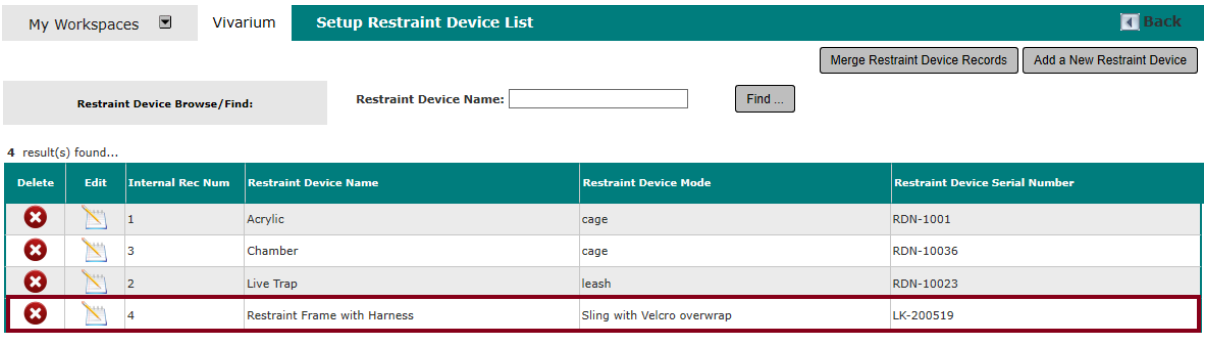
The **Add a new restraint device to the system** panel is opened.



Enter the **Restraint Device Name**, **Restraint Device Mode** and **Restraint Device Serial Number**, then click the **Save Changes** button to close the add panel.

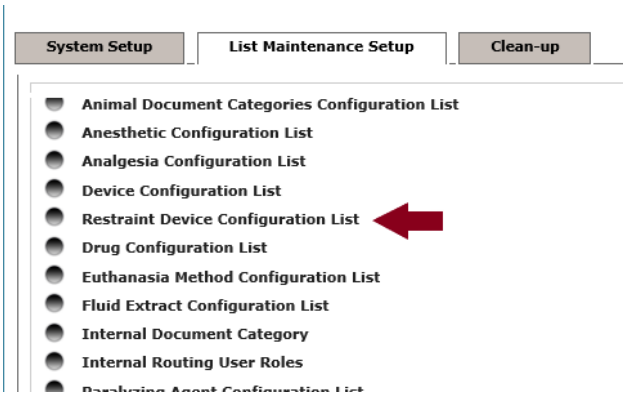


The record is added to the list on the **Setup Restraint Device List** page.

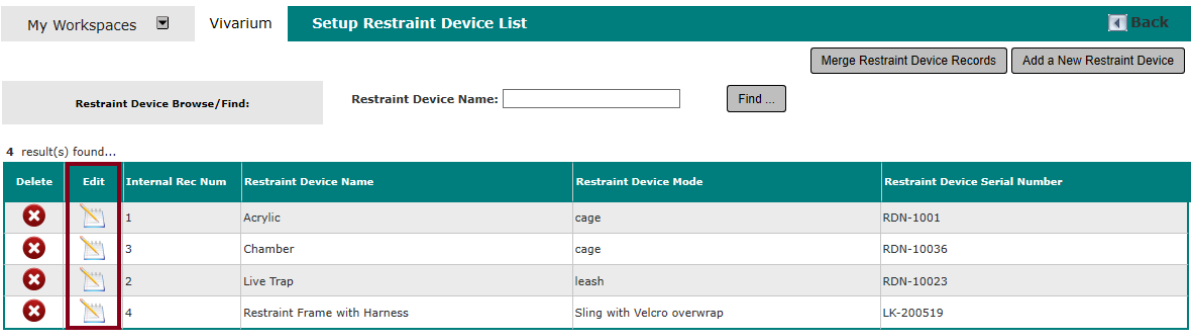


Edit Restraint Device

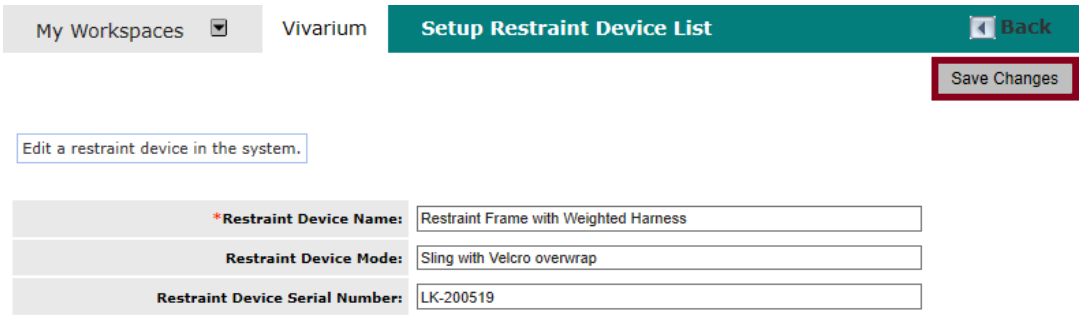
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Restraint Device Configuration List** link.



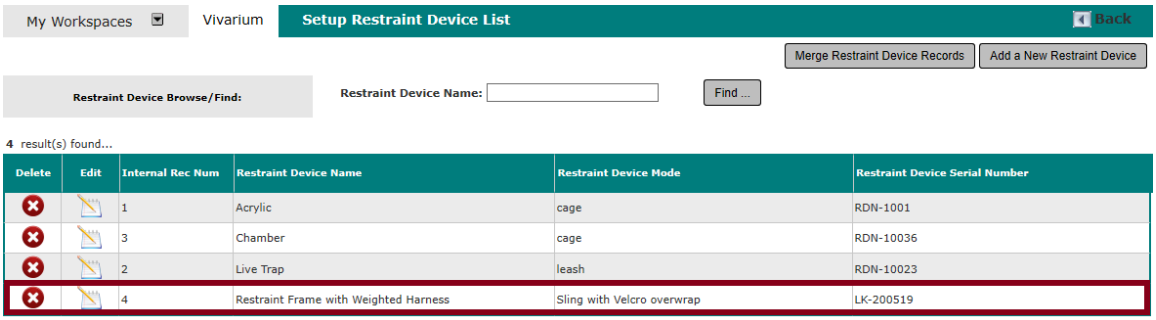
The **Setup Restraint Device List** page is opened. Click the icon in the **Edit** column for the applicable record.



The record is opened in an **Edit a restraint device in the system** panel.

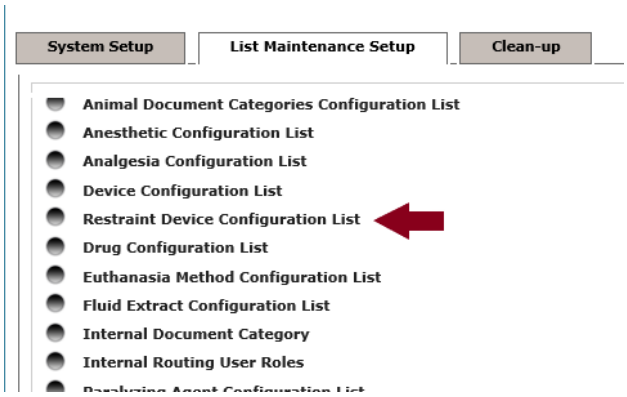


Make desired changes, then click the **Save Changes** button to update the record and close the add panel. The record is revised on the **Setup Restraint Device List** page.

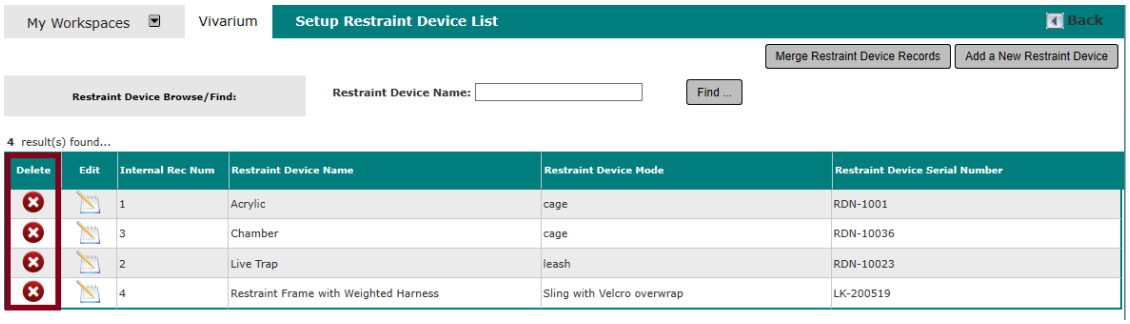


Delete Restraint Device

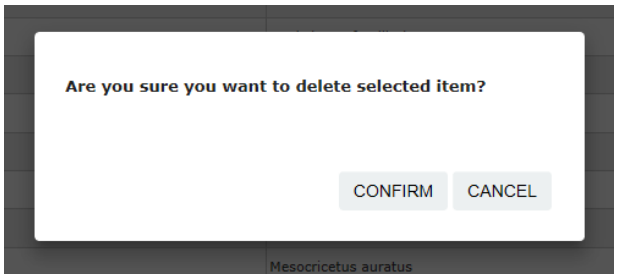
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Restraint Device Configuration List** link.



The **Setup Restraint Device List** page is opened. Click the icon in the **Delete** column for the applicable record.



A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record and return to the **Setup Restraint Device List** page.

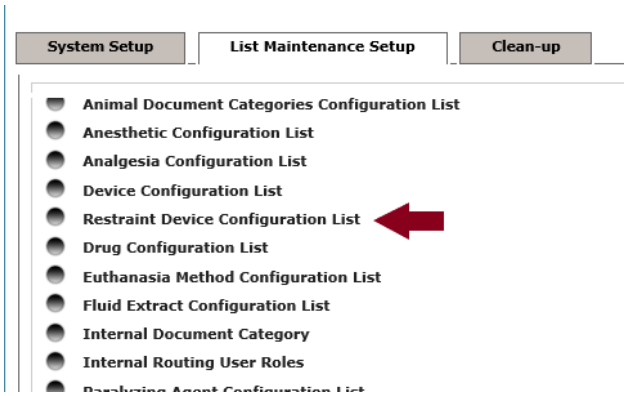
Click **CONFIRM** to complete deletion of the record and return to the **Setup Restraint Device List** page.

Merge Restraint Device Records

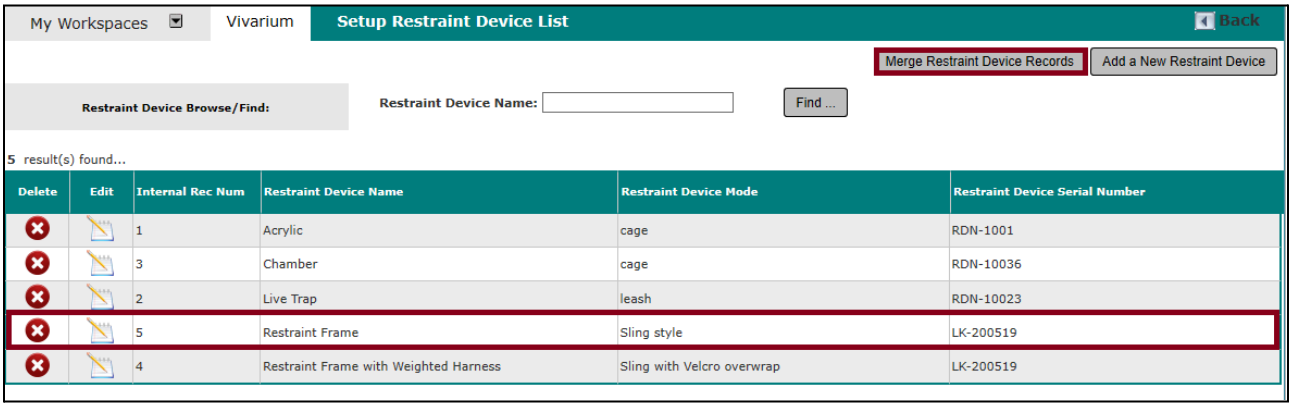
Sometimes a duplicate or erroneous restraint device record is created and then assigned to one or more study applications before the mistake is caught.

In that situation, the duplicate or erroneous restraint device record can be merged with a valid restraint device record. The valid restraint device is then substituted for the duplicate/erroneous restraint device previously assigned to study applications.

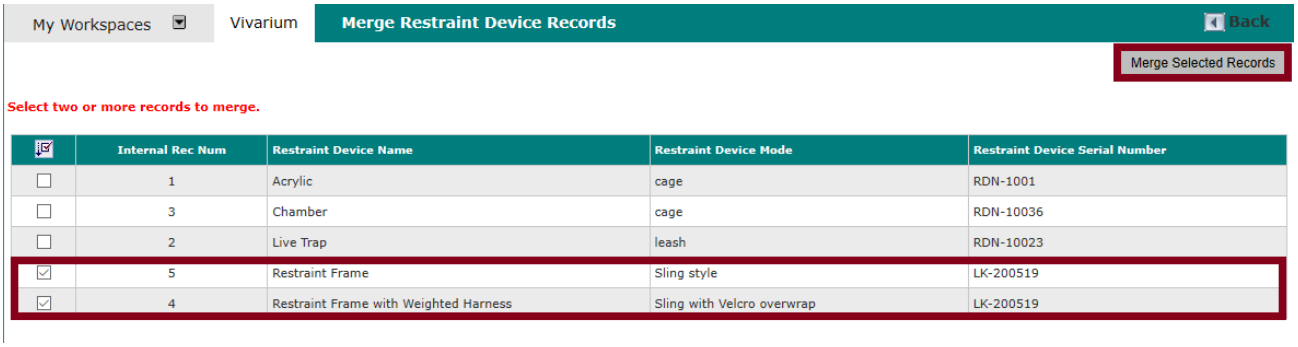
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Restraint Device Configuration List** link.



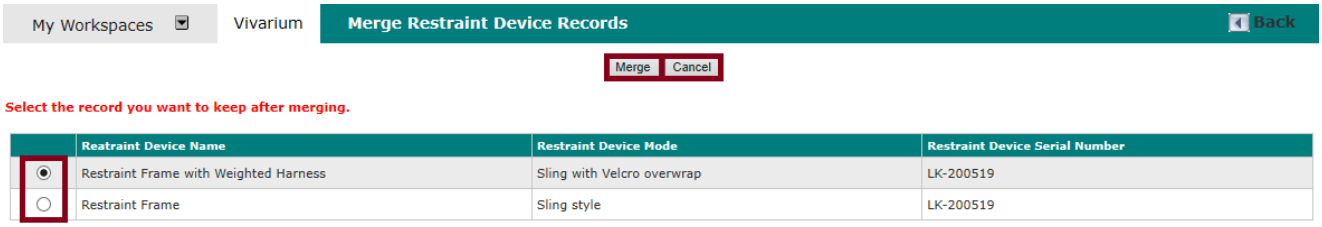
The **Setup Restraint Device List** page is opened.



In the example shown above, the first Restraint Frame device record in the list was created in error but may have been assigned to one or more studies. Click the **Merge Restraint Device Records** button to begin. The **Merge Restraint Device Records** page opens.

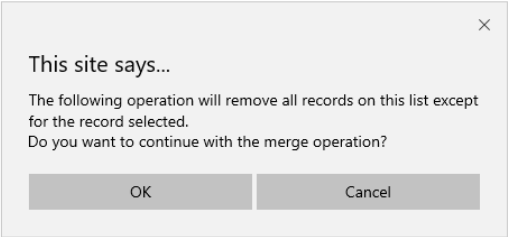


Select the checkboxes at far left for the device records to be merged and click the **Merge Selected Records** button. A new panel opens with only the selected records listed.

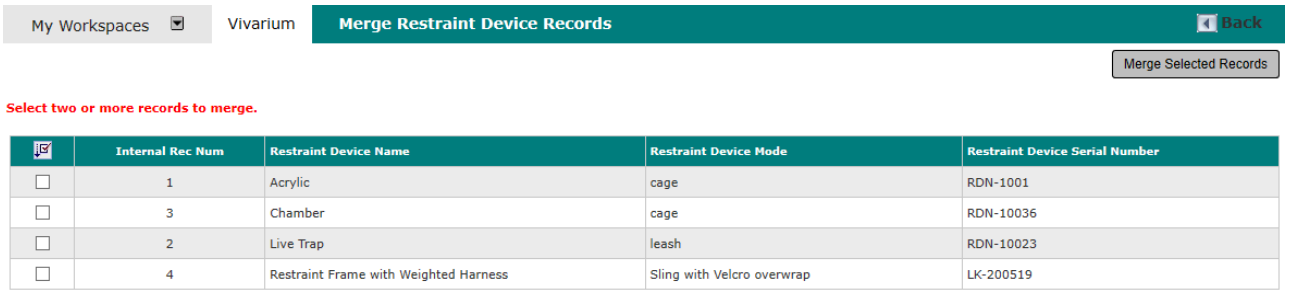


Click the **Cancel** button to close the panel without merging the records.

Note the red instruction text above the table: select the radio button at far left for the record to be KEPT, then click the **Merge** button. A confirmation popup window appears.



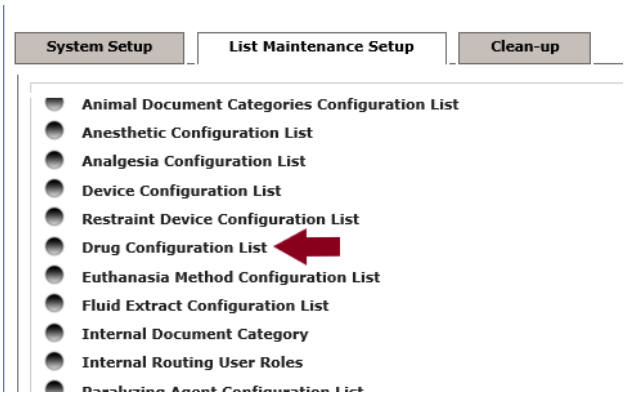
As the popup states, all records on the list will be deleted except for the selected record. Click **Cancel** to close the popup without merging the records. Click **OK** to complete the merge and return to the **Merge Restraint Device Records** page, where the merge can be confirmed.



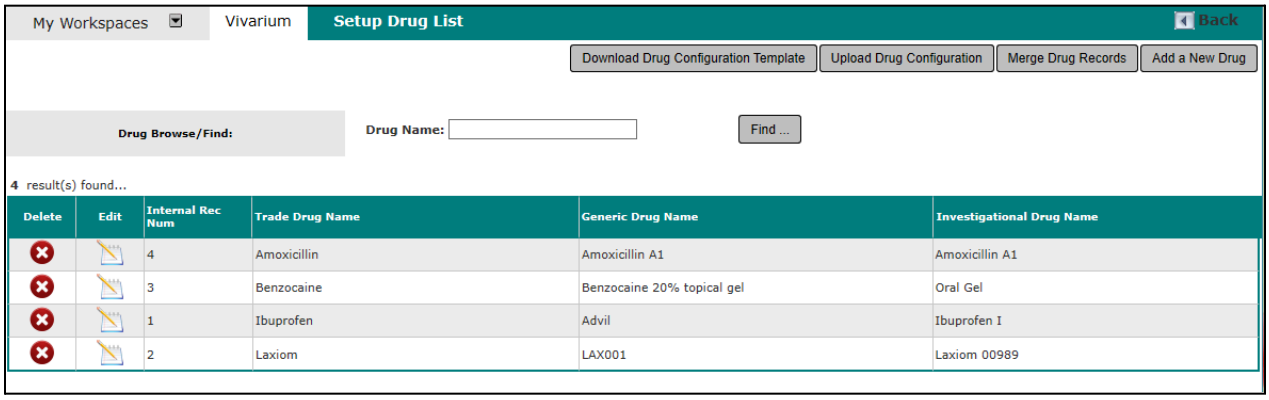
	Internal Rec Num	Restraint Device Name	Restraint Device Mode	Restraint Device Serial Number
☐	1	Acrylic	cage	RDN-1001
☐	3	Chamber	cage	RDN-10036
☐	2	Live Trap	leash	RDN-10023
☐	4	Restraint Frame with Weighted Harness	Sling with Velcro overwrap	LK-200519

Drug Configuration List

The **Drug Configuration List** is where a list of drugs approved by the institution for use in studies is maintained in the iRIS™ system. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Drug Configuration List** link.



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



If the drug list is lengthy, use the **Drug Browse/Find** section above the list to search for records by **Drug Name**.

Drug List Implementation – Application Side

Where this field is in use by the institution, it appears in the study application form.

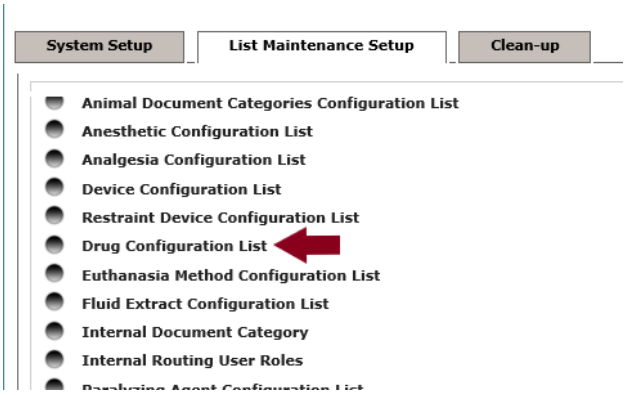
For more information about the IACUC study application, see the iRIS™ IACUC Assistant - IACUC Assistant Manual.

Drug List Implementation – Board Side

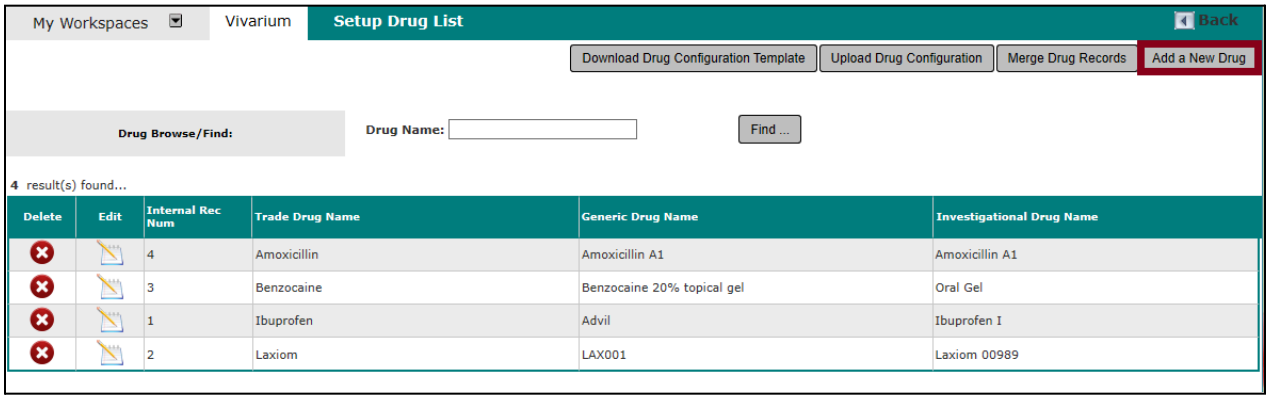
Drugs are added on the application/study side where required and are not generally subject to direct revision by the board.

Add a New Drug

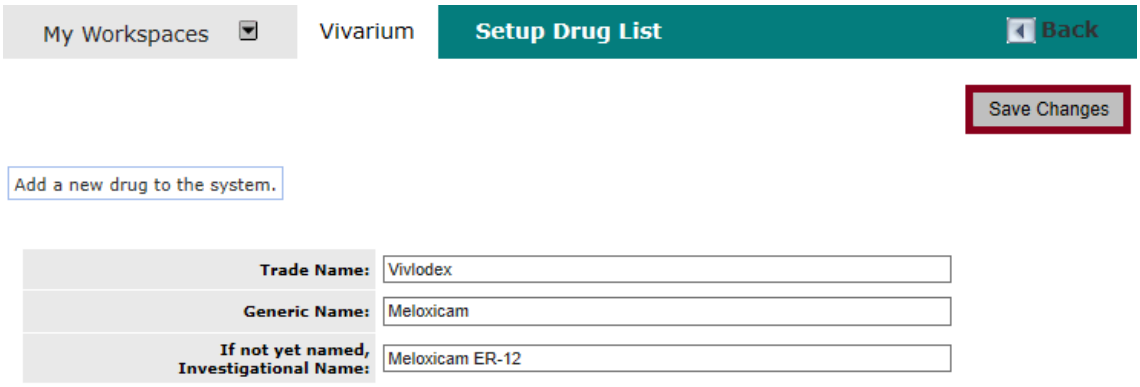
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Drug Configuration List** link.



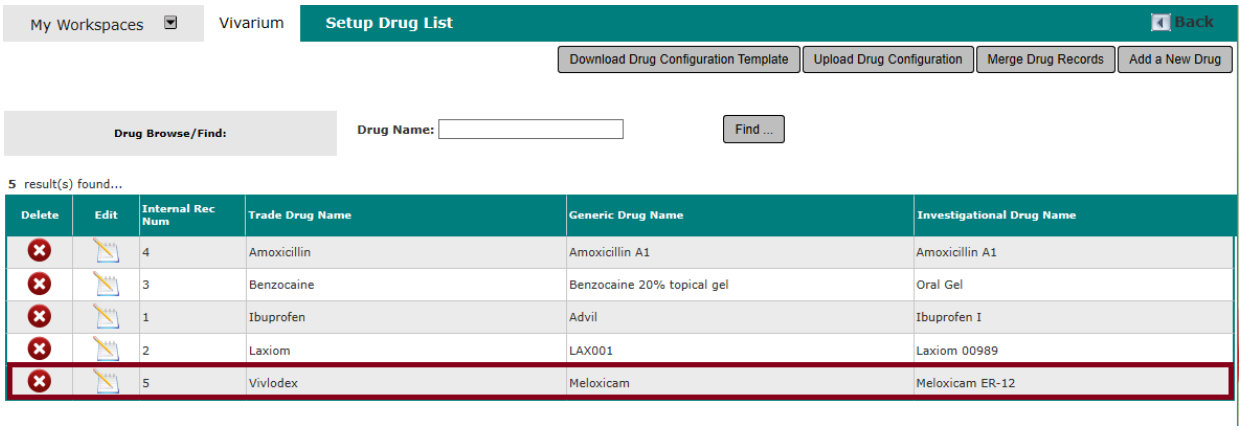
The **Setup Drug List** page is opened. Click the **Add a New Drug** button.



An **Add a new drug to the system** panel opens. Enter **Trade Name**, **Generic Name** and if not yet named, **Investigational Name** details, then click the **Save Changes** button to save the record and close the add panel.

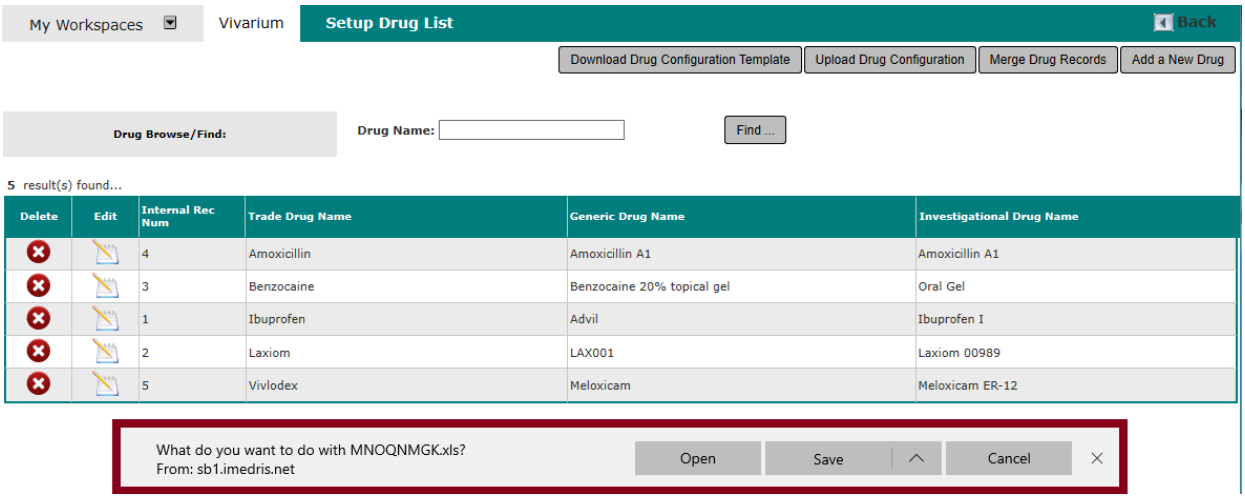


The new drug is added on the **Setup Drug List** page.



Download Drug Configuration Template

The iRIS™ system provides a mechanism for adding a large quantity of drug records at once, via population and upload of a pre-formatted Excel template. Click the **Download Drug Configuration Template** button to begin. A download dialog opens at the bottom of the page.

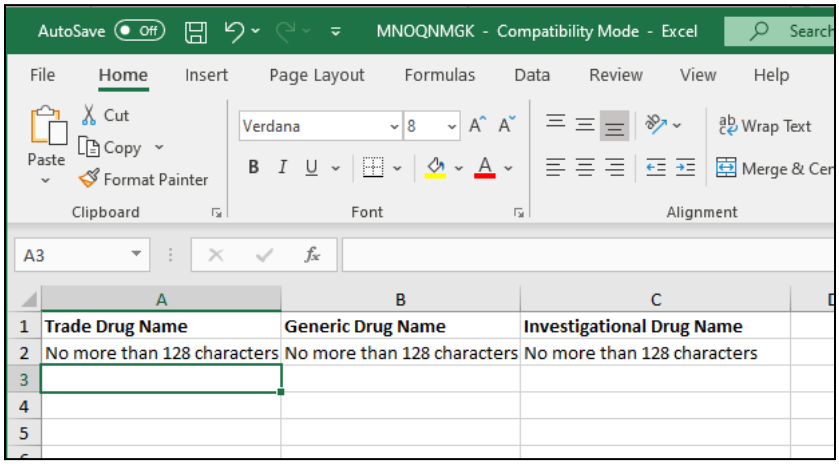


Click the **Cancel** button in the download dialog popup to close it without downloading the template.

Click the **Save** button in the download dialog popup to save the template to the default Downloads folder on the computer. Click the upward-pointing arrow to the right of the **Save** button to access Save As options, which allow for saving the template to the user's desired location on the computer.

The download dialog popup message changes when the download is complete, as shown below.

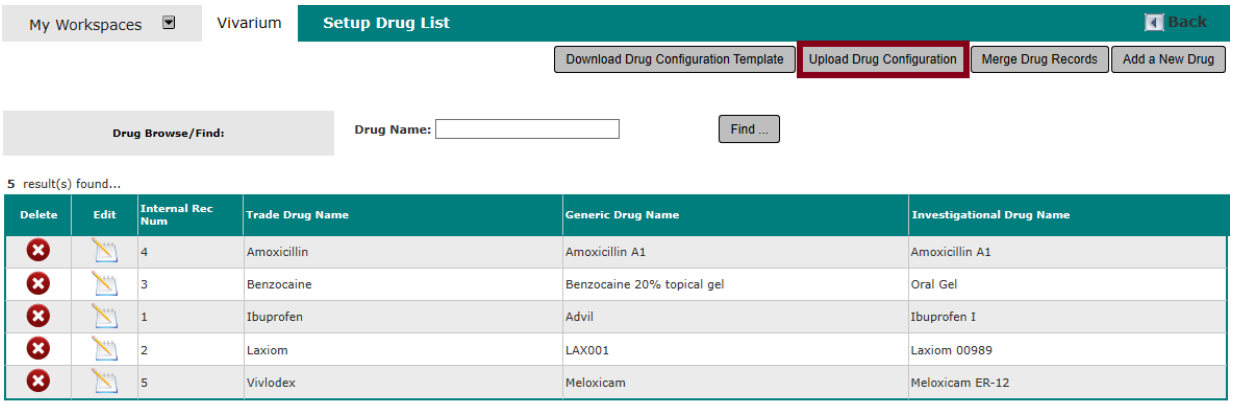
Navigate to the downloaded template file and open it.



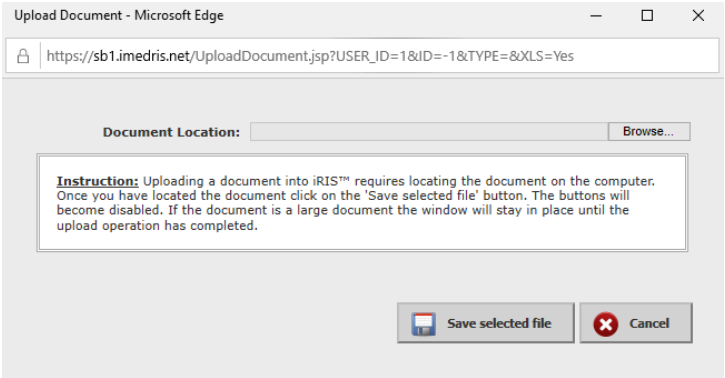
As shown in the screenshot above, field length limits are provided in the second row. Enter desired drug records to complete the template and save changes to the file.

Upload Drug Configuration Template

When the Drug Template has been populated with all desired data, Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Drug Configuration List** link. The **Setup Drug List** page opens. Click the **Upload Drug Configuration** button.



An upload dialog popup appears.



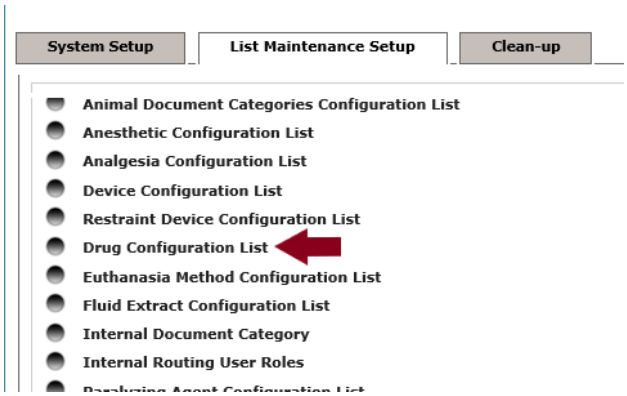
Click the **Cancel** button to close the dialog without completing the upload.

Click the **Browse…** button to navigate to the completed template and select it, then click the **Save selected file** button to complete the upload.

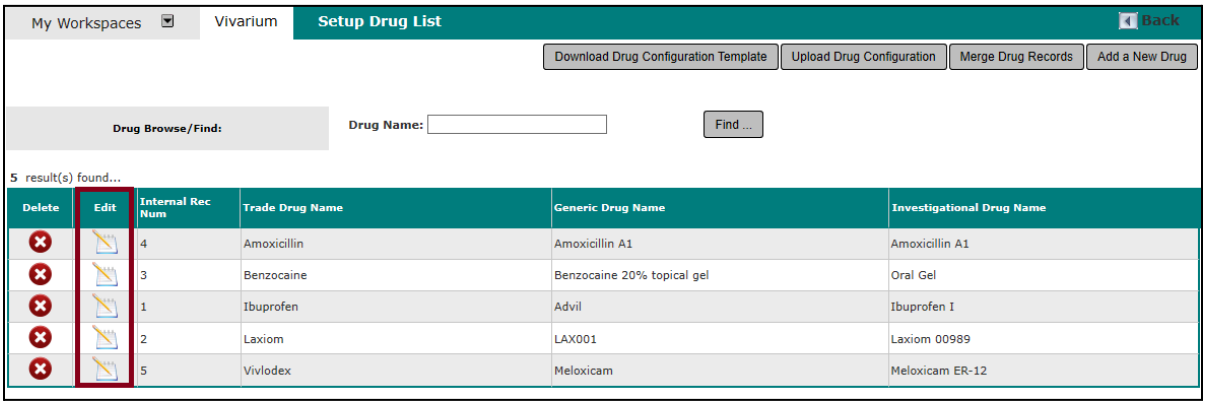
Review the uploaded records in the **Setup Drug List** page to ensure the uploaded records have correctly populated all columns. Any records that do not meet data content requirements must be edited or deleted promptly, to ensure they cannot be mistakenly assigned to studies.

Edit Drug

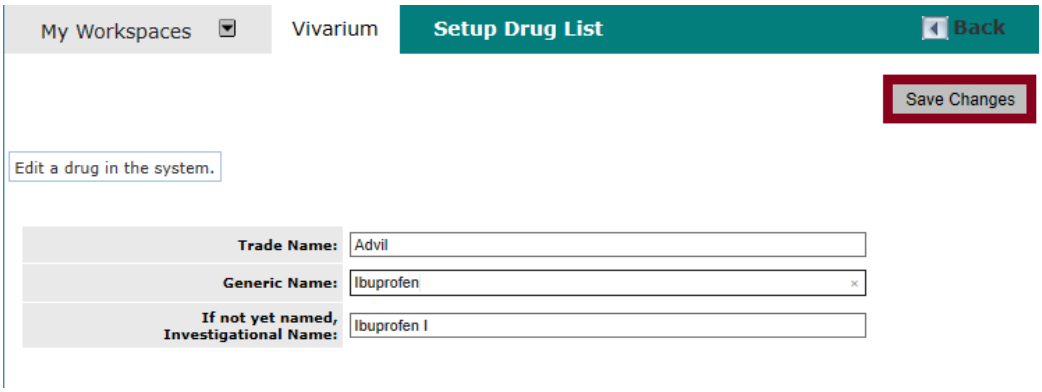
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Drug Configuration List** link.



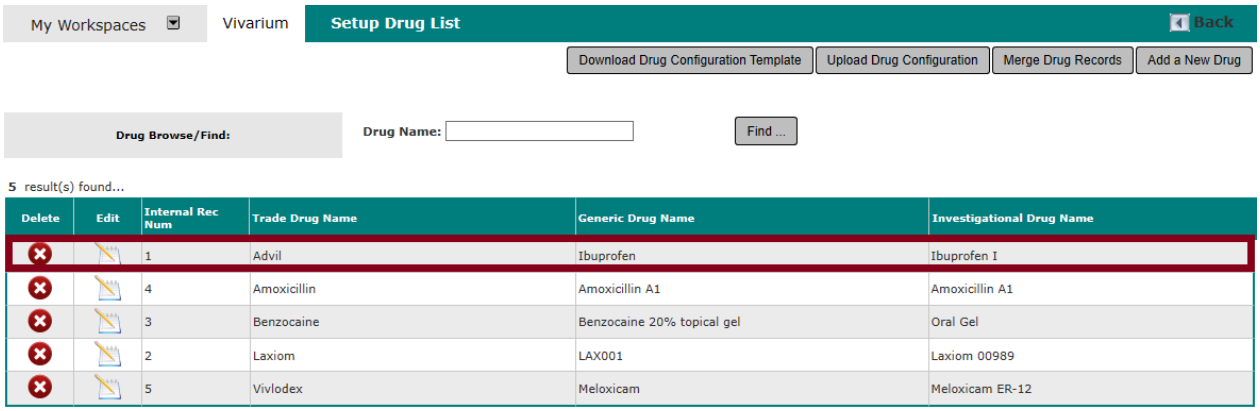
The **Setup Drug List** page is opened. Click the icon in the **Edit** column for the applicable record.



The record is opened in an **Edit a drug in the system** panel.

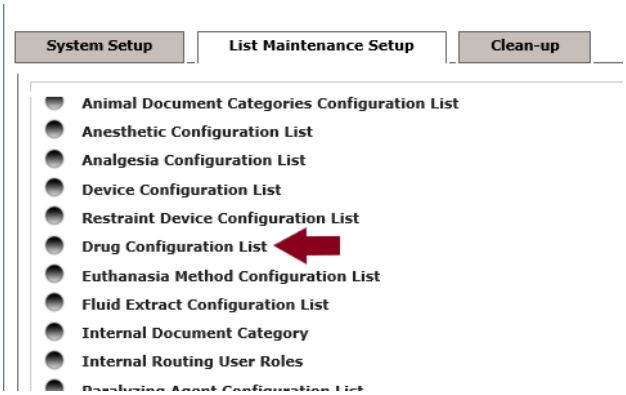


Make desired changes and click the **Save Changes** button to save the record and close the edit panel. The record is revised on the **Setup Drug List** page.

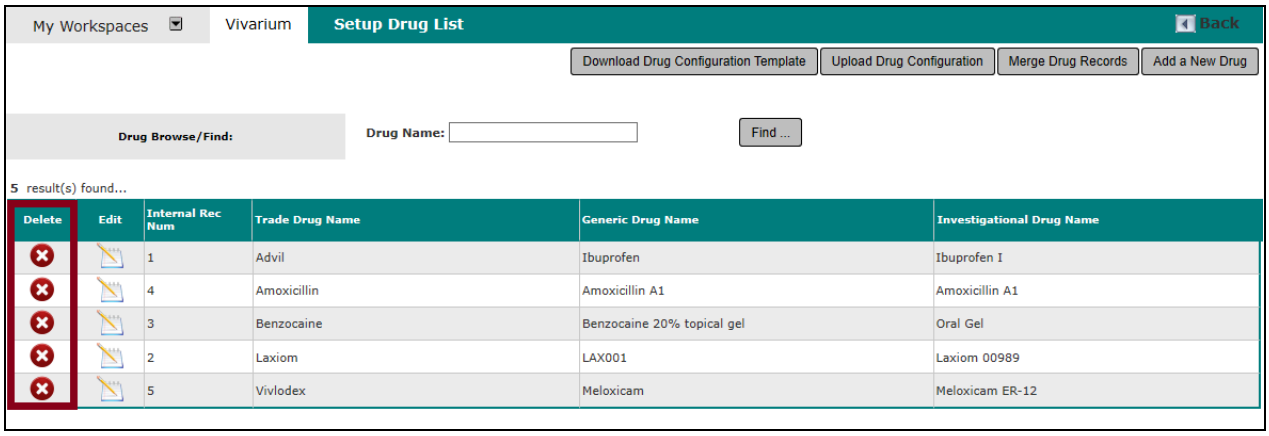


Delete Drug

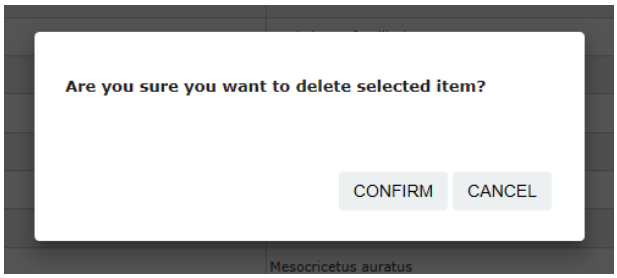
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Drug Configuration List** link.



The **Setup Drug List** page is opened. Click the icon in the **Delete** column for the applicable record.



A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record and return to the **Setup Drug List** page.

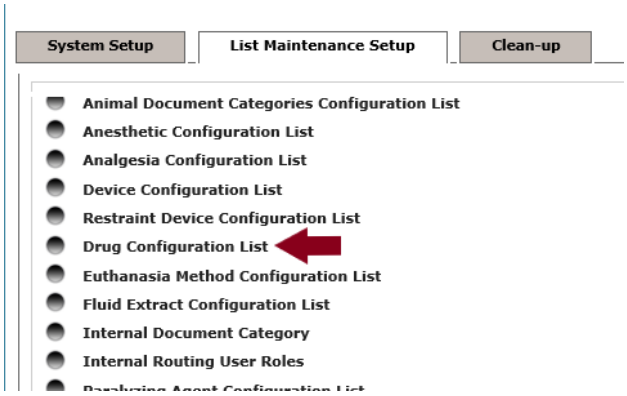
Click **CONFIRM** to complete deletion of the record and return to the **Setup Drug List** page.

Merge Drug Records

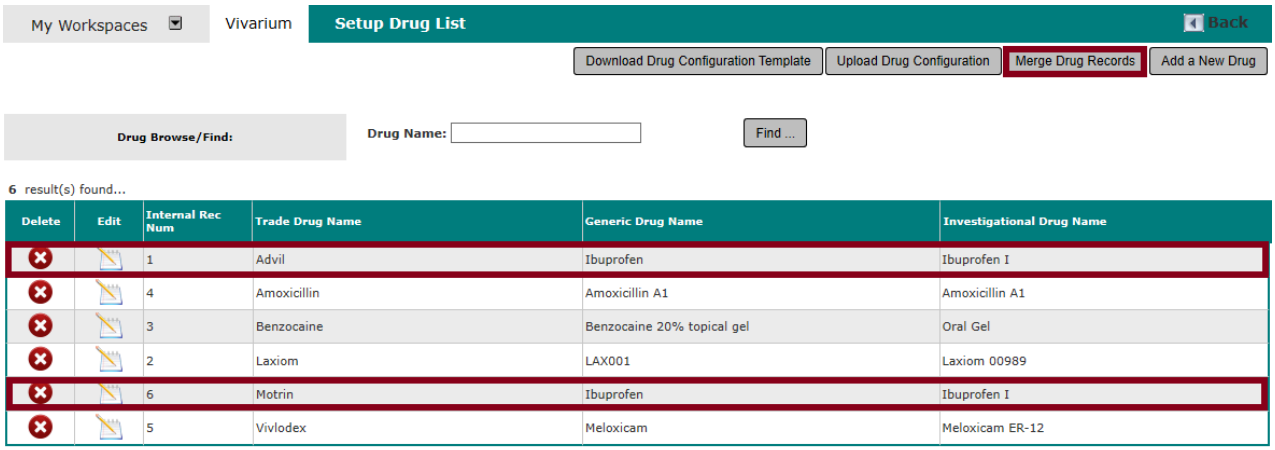
Sometimes a duplicate or erroneous drug record is created and then assigned to one or more study applications before the mistake is caught.

In that situation, the duplicate or erroneous drug record can be merged with a valid drug record. The valid drug record is then substituted for the duplicate/erroneous drug record previously assigned to study applications.

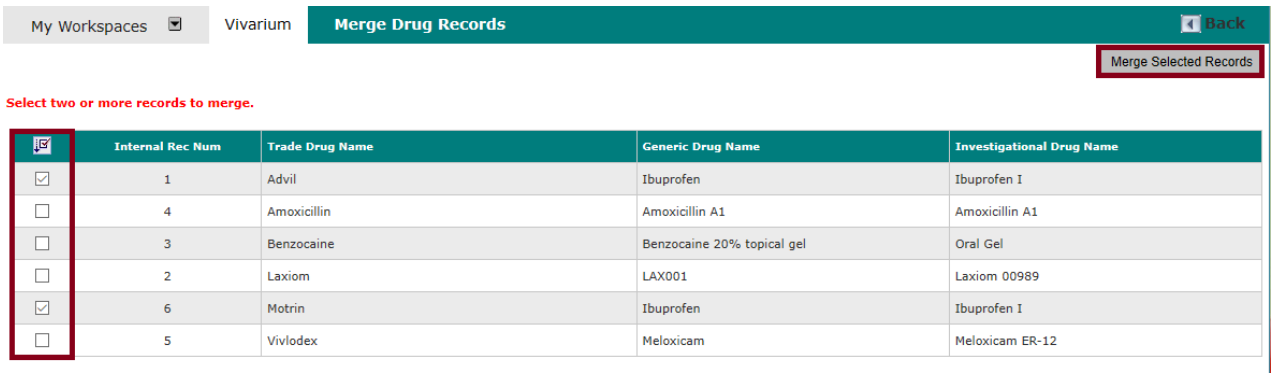
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Drug Configuration List** link.



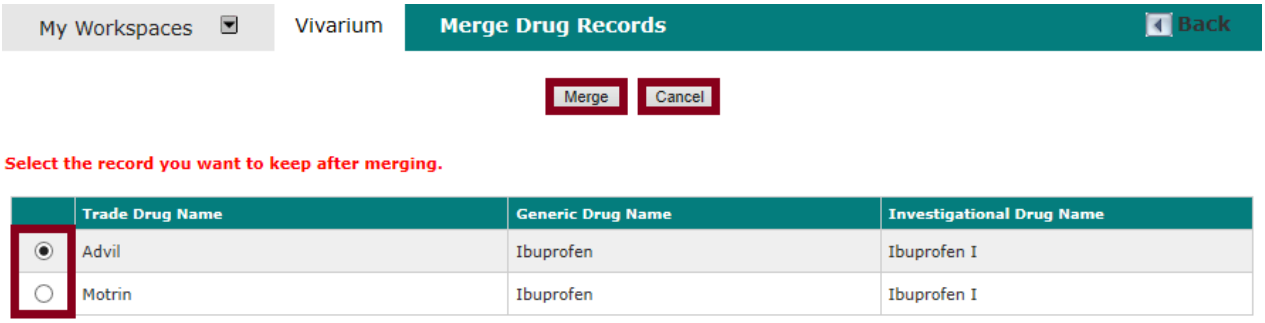
The **Setup Drug List** page is opened. Click the **Merge Drug Records** button.



In the example shown above, the "Motrin" drug record was created in error, as Motrin is another trade name for Ibuprofen and that drug is already in the list under the Trade Drug Name "Advil". The Motrin record may have been assigned to one or more studies and must be merged with the "Advil" record. Click the **Merge Selected Records** button to begin. The **Merge Drug Records** page opens.

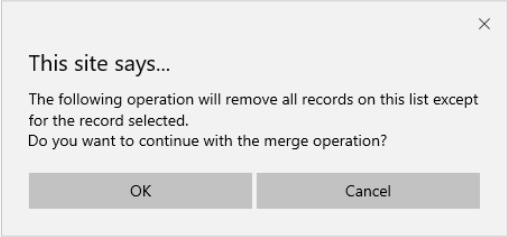


Select the checkboxes at far left for the drug records to be merged and click the **Merge Selected Records** button. A new panel opens with only the selected records listed.

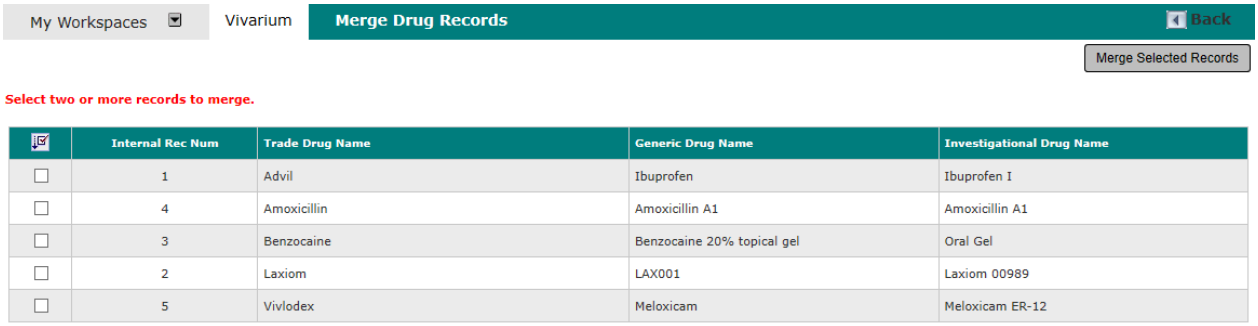


Click the **Cancel** button to close the panel without merging the records.

Note the red instruction text above the table: select the radio button at far left for the record to be KEPT, then click the **Merge** button. A confirmation popup window appears.



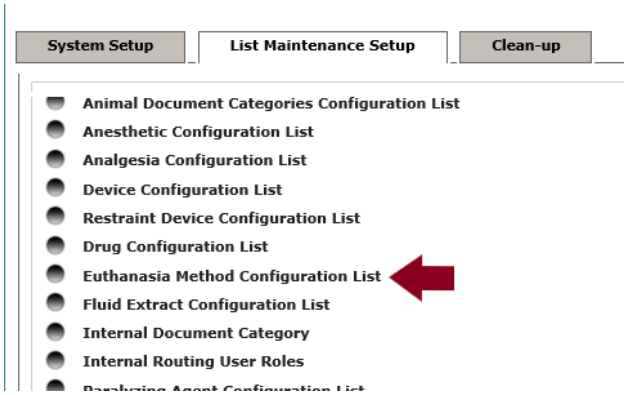
As the popup states, all records on the list will be deleted except for the selected record. Click **Cancel** to close the popup without merging the records. Click **OK** to complete the merge and return to the **Merge Drug Records** page, where the merge can be confirmed.



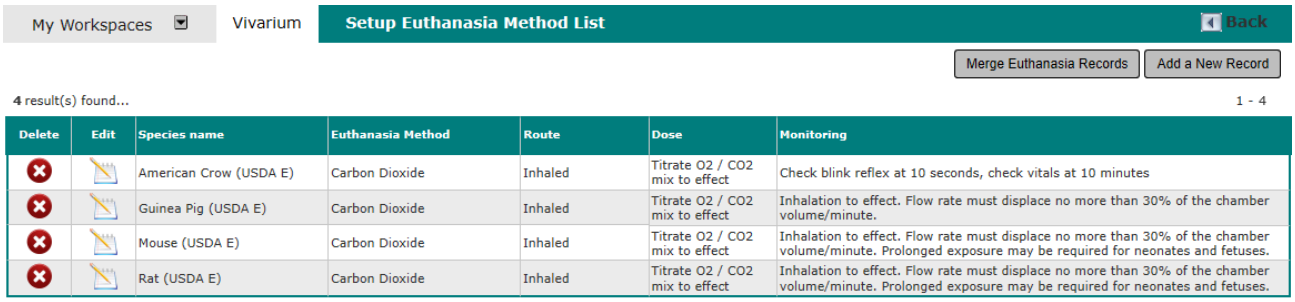
	Internal Rec Num	Trade Drug Name	Generic Drug Name	Investigational Drug Name
☐	1	Advil	Ibuprofen	Ibuprofen I
☐	4	Amoxicillin	Amoxicillin A1	Amoxicillin A1
☐	3	Benzocaine	Benzocaine 20% topical gel	Oral Gel
☐	2	Laxiom	LAX001	Laxiom 00989
☐	5	Vivlodex	Meloxicam	Meloxicam ER-12

Euthanasia Method Configuration List

The **Euthanasia Method Configuration List** is where a list of humane methods of euthanasia approved by the institution for use in animal subject studies is maintained in the iRIS™ system. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Euthanasia Method Configuration List** link.



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



Delete	Edit	Species name	Euthanasia Method	Route	Dose	Monitoring
		American Crow (USDA E)	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Check blink reflex at 10 seconds, check vitals at 10 minutes
		Guinea Pig (USDA E)	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Inhalation to effect. Flow rate must displace no more than 30% of the chamber volume/minute.
		Mouse (USDA E)	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Inhalation to effect. Flow rate must displace no more than 30% of the chamber volume/minute. Prolonged exposure may be required for neonates and fetuses.
		Rat (USDA E)	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Inhalation to effect. Flow rate must displace no more than 30% of the chamber volume/minute. Prolonged exposure may be required for neonates and fetuses.

Euthanasia List Implementation – Application Side

The euthanasia list is employed in the following areas on the application side of iRIS™.

IACUC / ARC Study Application Pain and Distress section — the **Setup Euthanasia Method List** is made available in an IACUC / ARC application via the **Add a New Euthanasia to the Study** button

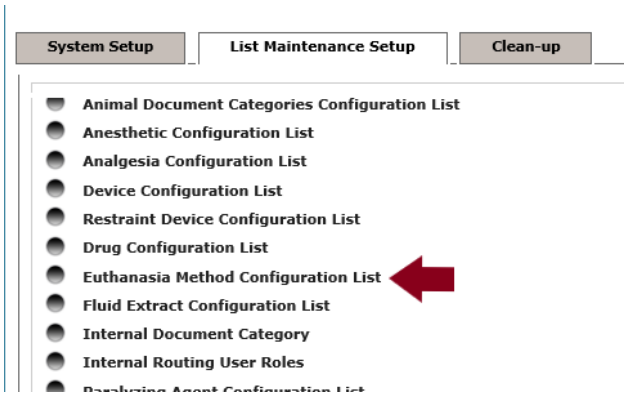
For more information about the IACUC study application, see the iRIS™ IACUC Assistant - IACUC Assistant Manual.

Euthanasia List Implementation – Board Side

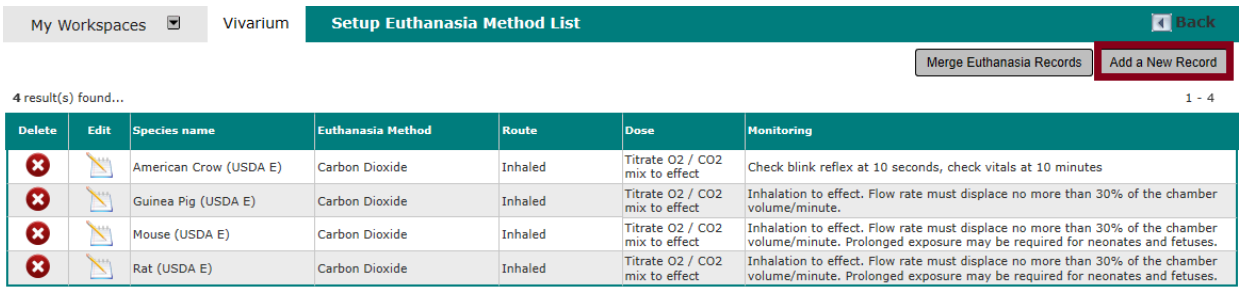
Euthanasia methods are added on the application side where required and are not generally subject to direct revision by the board.

Add Euthanasia Method

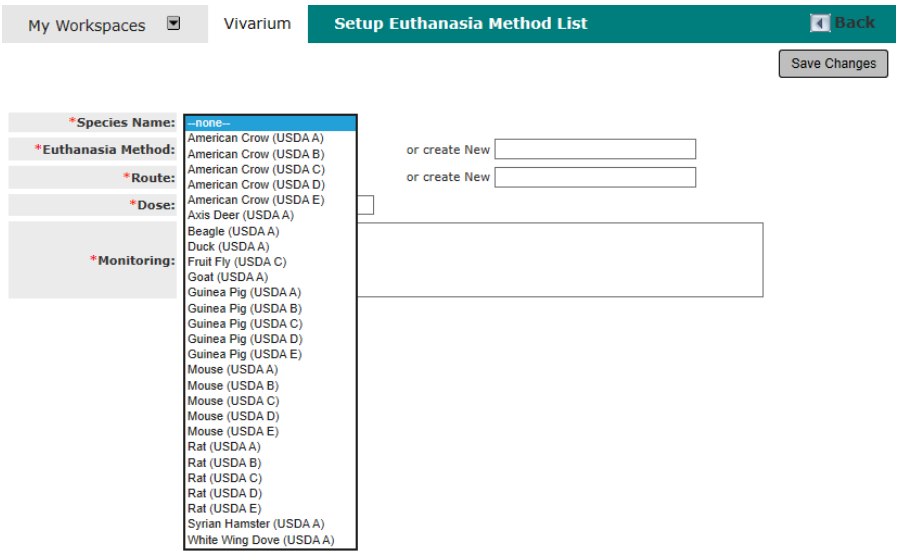
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Euthanasia Method Configuration List** link.



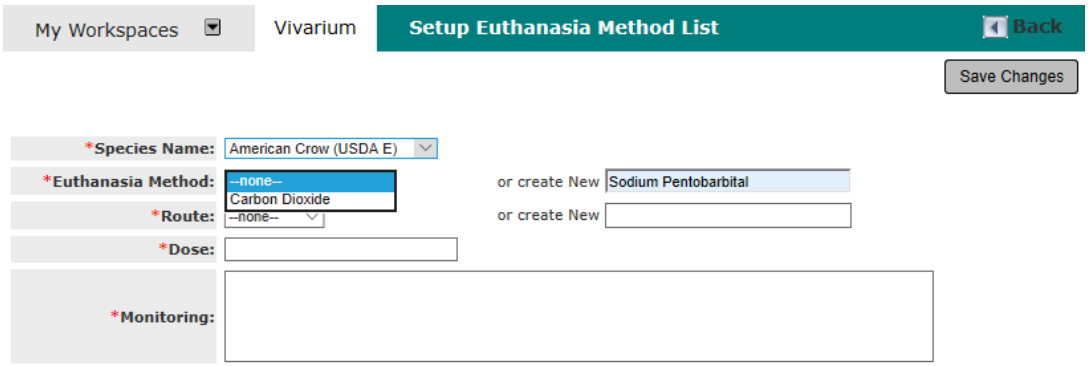
The **Setup Euthanasia Method List** page is opened. Click the **Add a New Record** button.



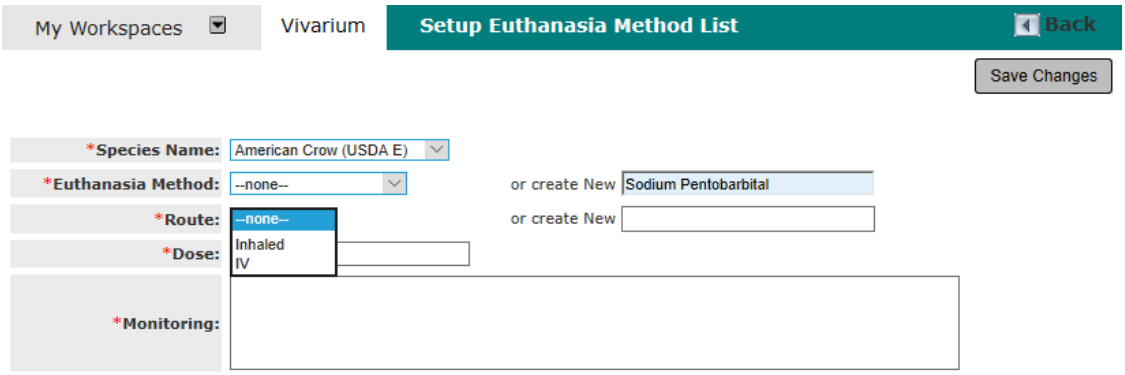
An add panel is opened for creation of the new record. Click on the **Species Name** dropdown list to open it and select the desired species.



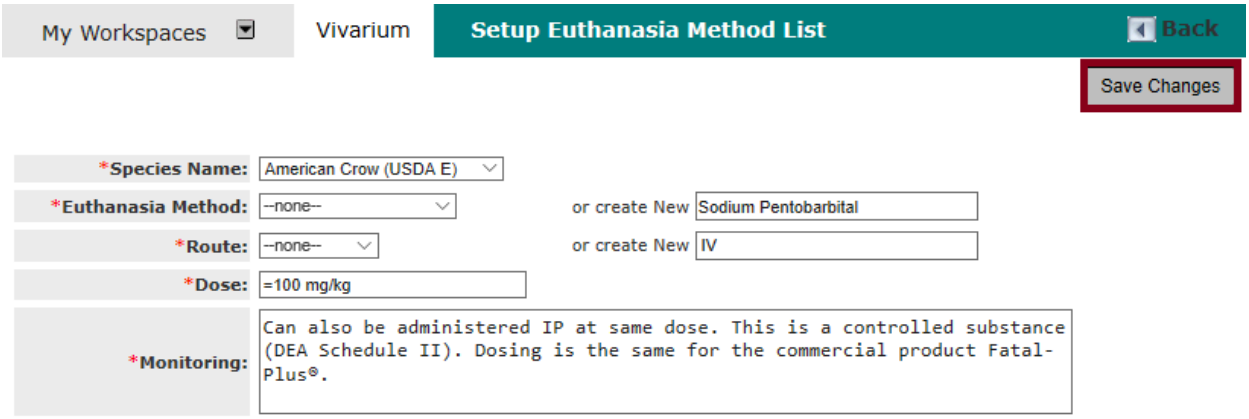
Click on the **Euthanasia Method** dropdown list to open it. If the desired item is not in the list, manually enter it in the **or create New** field directly to the right of the dropdown list.



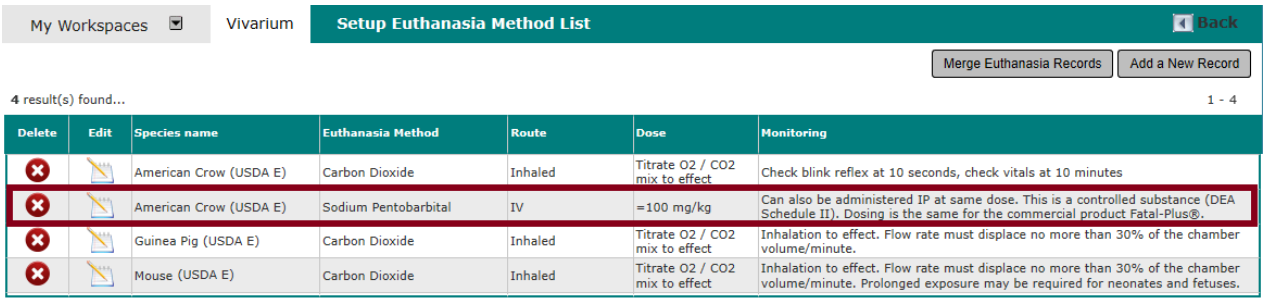
Click on the **Route** dropdown list to open it. If the desired item is not in the list, manually enter it in the **or create New** field directly to the right of the dropdown list.



Enter **Dose** and **Monitoring** details, then click the **Save Changes** button to save the record and close the add panel.

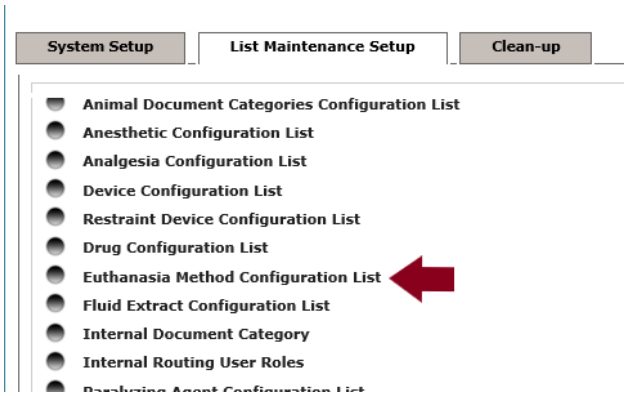


The new record is added on the **Setup Euthanasia Method List** page.

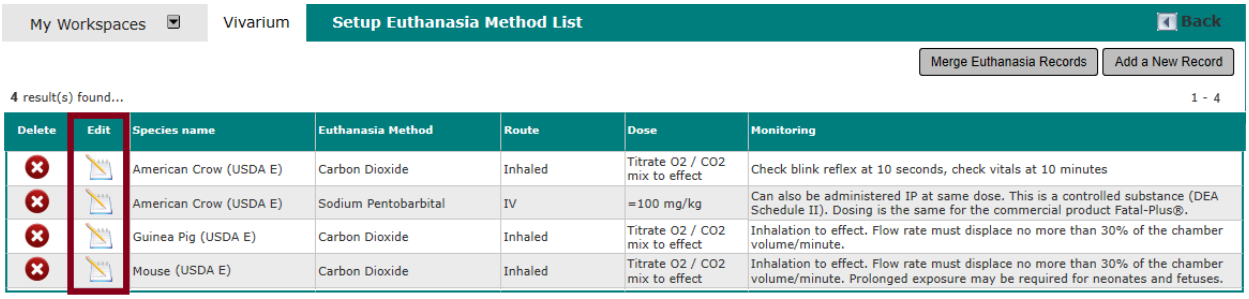


Edit Euthanasia Method

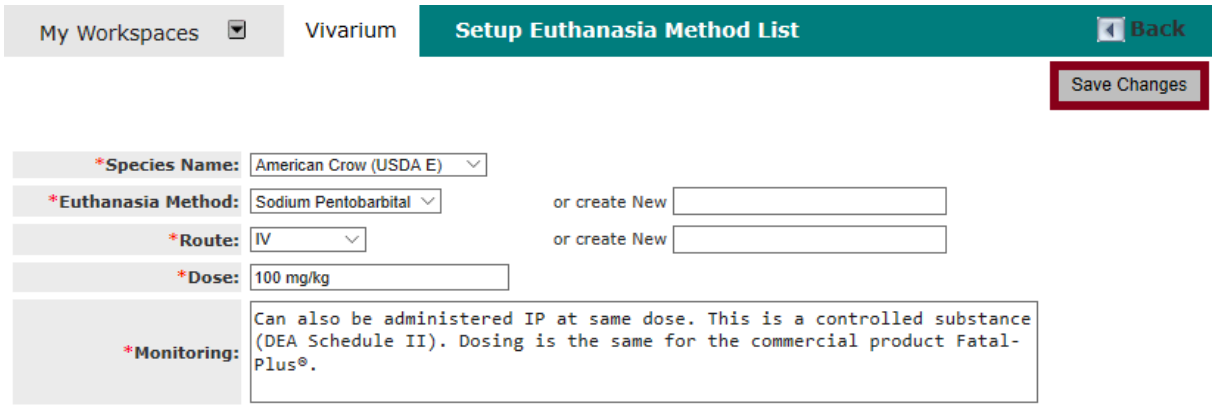
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Euthanasia Method Configuration List** link.



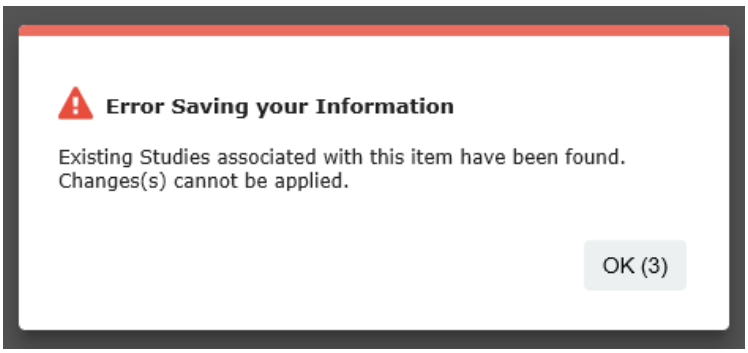
The **Setup Euthanasia List** page is opened. Click the icon in the **Edit** column for the applicable record. In this example, the equals sign (=) is being deleted from the **Dose** field in the second "American Crow (USDA E)" record.



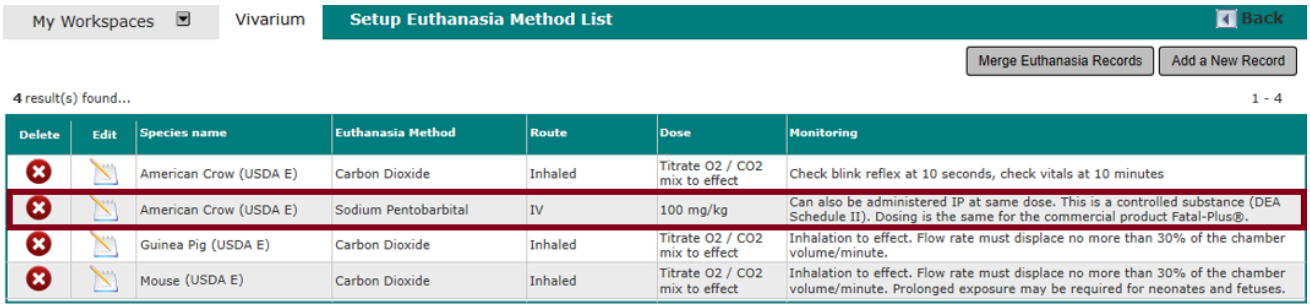
The record is opened in an edit panel. Make desired changes and click the **Save Changes** button.



When an attempt is made to change the **Species Name** or **Euthanasia Method** in a euthanasia method record that is already assigned to one or more studies, the following warning popup window appears and the record is not edited.

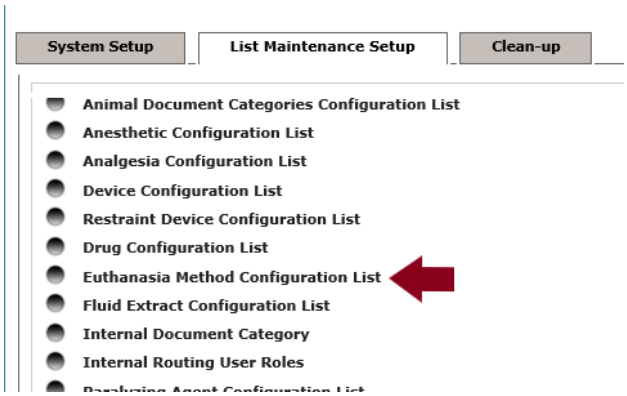


Otherwise, the record is revised on the **Setup Euthanasia List** page.

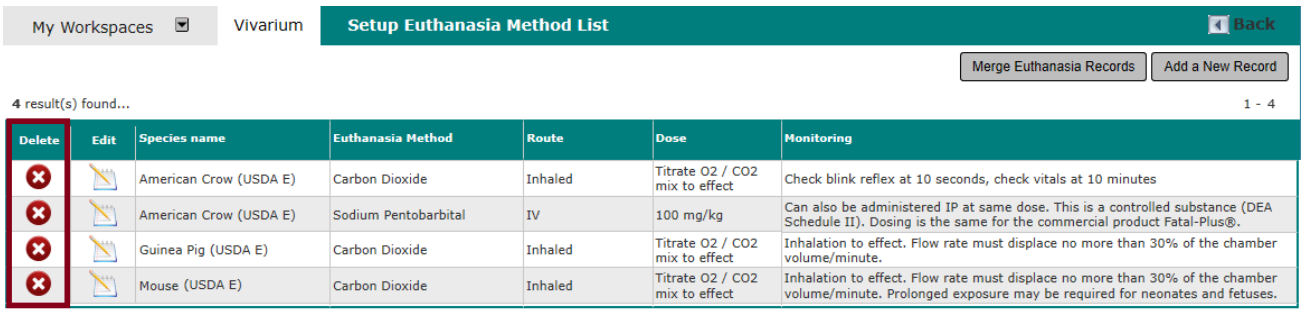


Delete Euthanasia Method

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Euthanasia Method Configuration List** link.

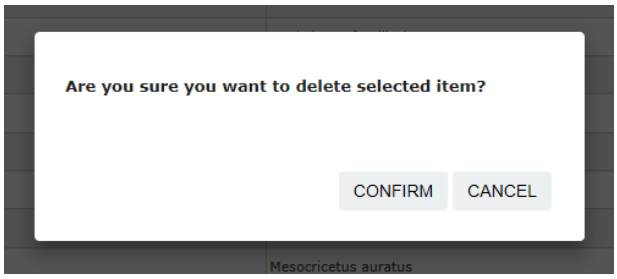


The **Setup Euthanasia List** page is opened. Click the icon in the **Delete** column for the applicable record.



Delete	Edit	Species name	Euthanasia Method	Route	Dose	Monitoring
		American Crow (USDA E)	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Check blink reflex at 10 seconds, check vitals at 10 minutes
		American Crow (USDA E)	Sodium Pentobarbital	IV	100 mg/kg	Can also be administered IP at same dose. This is a controlled substance (DEA Schedule II). Dosing is the same for the commercial product Fatal-Plus®.
		Guinea Pig (USDA E)	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Inhalation to effect. Flow rate must displace no more than 30% of the chamber volume/minute.
		Mouse (USDA E)	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Inhalation to effect. Flow rate must displace no more than 30% of the chamber volume/minute. Prolonged exposure may be required for neonates and fetuses.

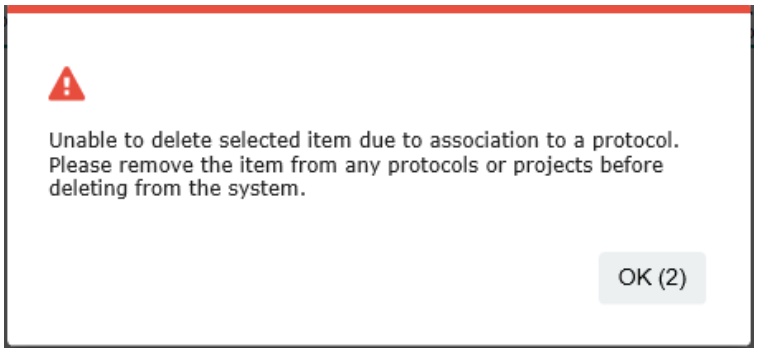
A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record and return to the **Setup Euthanasia Method List** page.

Click **CONFIRM** to complete deletion of the record and return to the **Setup Euthanasia Method List** page.

When an attempt is made to delete a euthanasia method already assigned to one or more studies, the following warning popup window appears and the record is not deleted.

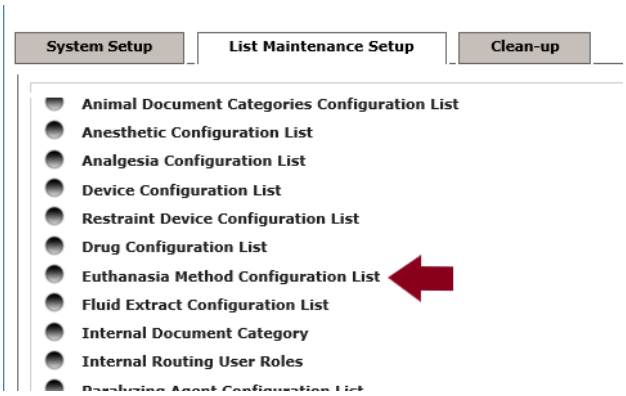


Merge Euthanasia Method Records

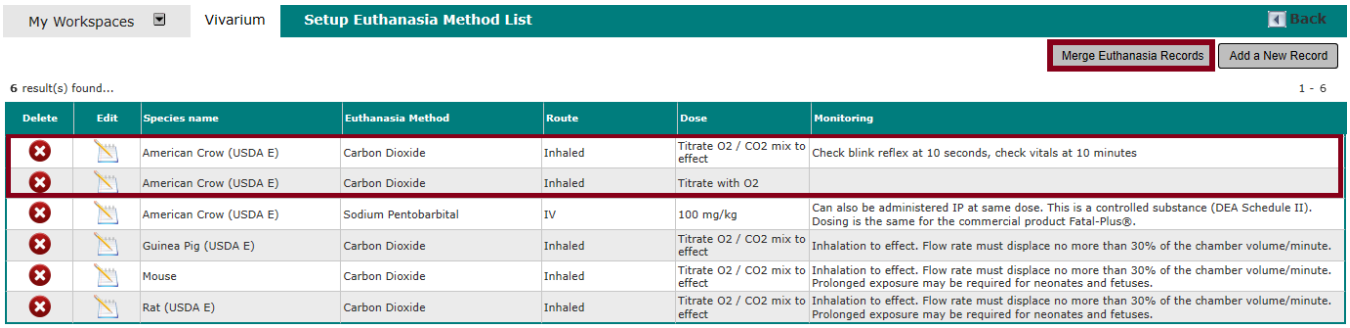
Sometimes a duplicate or erroneous euthanasia record is created and then assigned to one or more study applications before the mistake is caught.

In that situation, the duplicate or erroneous euthanasia record can be merged with a valid euthanasia record. The valid euthanasia record is then substituted for the duplicate/erroneous euthanasia record previously assigned to study applications.

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Euthanasia Method Configuration List** link.

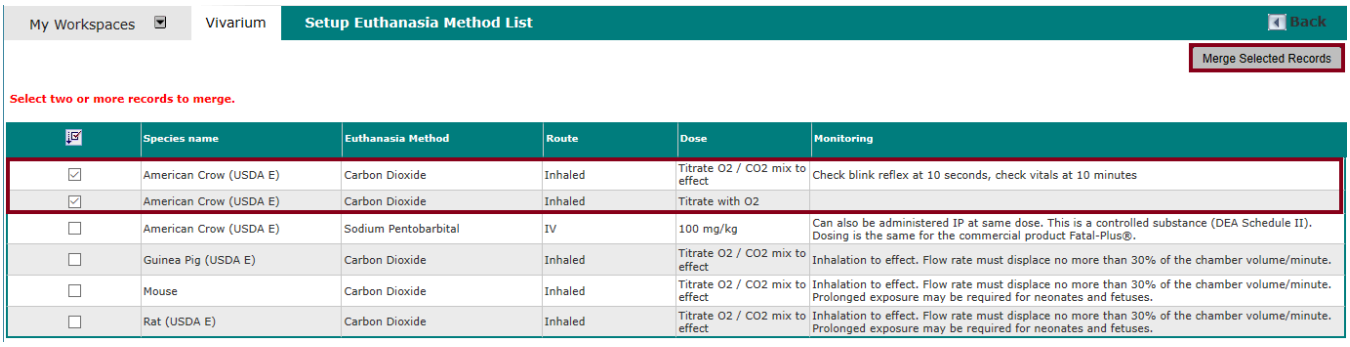


The **Setup Euthanasia Method List** page is opened. Click the **Merge Euthanasia Records** button.



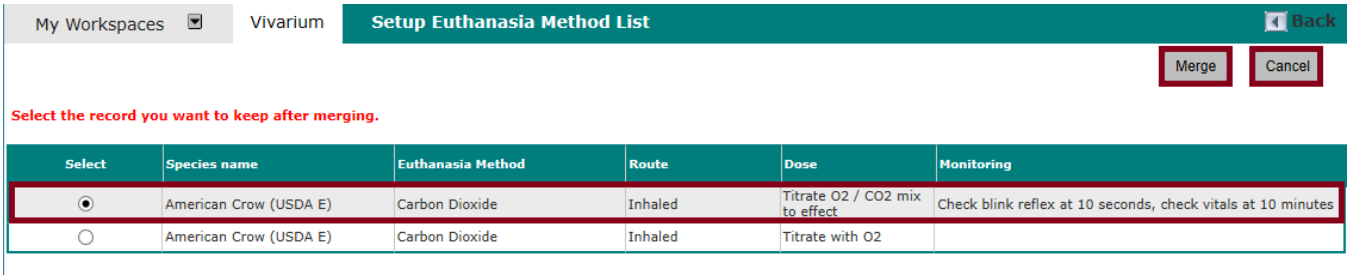
Delete	Edit	Species name	Euthanasia Method	Route	Dose	Monitoring
		American Crow (USDA E)	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Check blink reflex at 10 seconds, check vitals at 10 minutes
		American Crow (USDA E)	Carbon Dioxide	Inhaled	Titrate with O2	
		American Crow (USDA E)	Sodium Pentobarbital	IV	100 mg/kg	Can also be administered IP at same dose. This is a controlled substance (DEA Schedule II). Dosing is the same for the commercial product Fatal-Plus®.
		Guinea Pig (USDA E)	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Inhalation to effect. Flow rate must displace no more than 30% of the chamber volume/minute.
		Mouse	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Inhalation to effect. Flow rate must displace no more than 30% of the chamber volume/minute. Prolonged exposure may be required for neonates and fetuses.
		Rat (USDA E)	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Inhalation to effect. Flow rate must displace no more than 30% of the chamber volume/minute. Prolonged exposure may be required for neonates and fetuses.

In the example shown above, the second “Carbon Dioxide” record was created in error. This record may have been assigned to one or more studies and must be merged with the first “Carbon Dioxide” record. Click the **Merge Selected Records** button to begin. A merge panel opens.



	Species name	Euthanasia Method	Route	Dose	Monitoring
☑	American Crow (USDA E)	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Check blink reflex at 10 seconds, check vitals at 10 minutes
☑	American Crow (USDA E)	Carbon Dioxide	Inhaled	Titrate with O2	
☐	American Crow (USDA E)	Sodium Pentobarbital	IV	100 mg/kg	Can also be administered IP at same dose. This is a controlled substance (DEA Schedule II). Dosing is the same for the commercial product Fatal-Plus®.
☐	Guinea Pig (USDA E)	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Inhalation to effect. Flow rate must displace no more than 30% of the chamber volume/minute.
☐	Mouse	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Inhalation to effect. Flow rate must displace no more than 30% of the chamber volume/minute. Prolonged exposure may be required for neonates and fetuses.
☐	Rat (USDA E)	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Inhalation to effect. Flow rate must displace no more than 30% of the chamber volume/minute. Prolonged exposure may be required for neonates and fetuses.

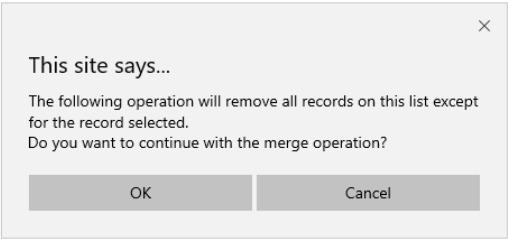
Select the checkboxes at far left for the records to be merged and click the **Merge Selected Records** button. A new panel opens with only the selected records listed.



Select	Species name	Euthanasia Method	Route	Dose	Monitoring
◉	American Crow (USDA E)	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Check blink reflex at 10 seconds, check vitals at 10 minutes
○	American Crow (USDA E)	Carbon Dioxide	Inhaled	Titrate with O2	

Click the **Cancel** button to close the panel without merging the records.

Note the red instruction text above the table: select the radio button at far left for the record to be KEPT, then click the **Merge** button. A confirmation popup window appears.



As the popup states, all records on the list will be deleted except for the selected record. Click **Cancel** to close the popup without merging the records. Click **OK** to complete the merge and return to the Setup Euthanasia page, where the merge can be confirmed.

My Workspaces | Vivarium | **Setup Euthanasia Method List** | Back

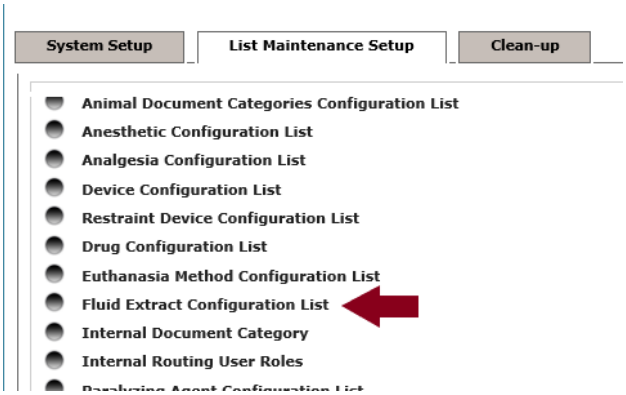
Merge Euthanasia Records | Add a New Record

5 result(s) found... 1 - 5

Delete	Edit	Species name	Euthanasia Method	Route	Dose	Monitoring
		American Crow (USDA E)	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Check blink reflex at 10 seconds, check vitals at 10 minutes
		American Crow (USDA E)	Sodium Pentobarbital	IV	100 mg/kg	Can also be administered IP at same dose. This is a controlled substance (DEA Schedule II). Dosing is the same for the commercial product Fatal-Plus®.
		Guinea Pig (USDA E)	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Inhalation to effect. Flow rate must displace no more than 30% of the chamber volume/minute.
		Mouse	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Inhalation to effect. Flow rate must displace no more than 30% of the chamber volume/minute. Prolonged exposure may be required for neonates and fetuses.
		Rat (USDA E)	Carbon Dioxide	Inhaled	Titrate O2 / CO2 mix to effect	Inhalation to effect. Flow rate must displace no more than 30% of the chamber volume/minute. Prolonged exposure may be required for neonates and fetuses.

Fluid Extract Configuration List

The **Fluid Extract Configuration List** is where a list of fluids that may be extracted from animal subjects in a study (e.g., blood, urine, etc.) is maintained in the iRIS™ system. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Fluid Extract Configuration List** link.



The **Setup Fluid Extract List** page is opened.

My Workspaces | Vivarium | **Setup Fluid Extract List** | Back

Merge Fluid Extract Records | Add a New Record

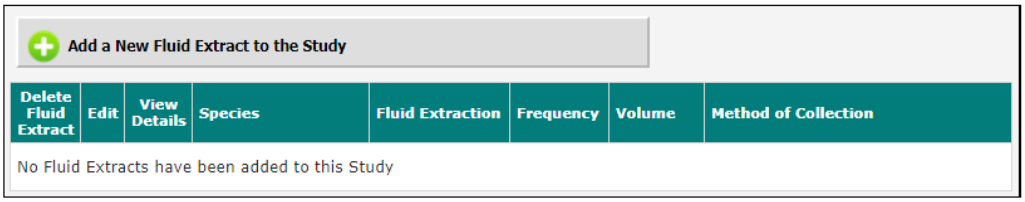
4 result(s) found... 1 - 4

Delete	Edit	Species name	Fluid Extraction	Frequency	Volume	Method of Collection
		American Crow (USDA C)	Blood	Daily	.5 mL	Venous draw
		Guinea Pig (USDA D)	Urine	Weekly	.5 mL	Cystocentesis
		Mouse (USDA C)	Saliva	Daily	As collected	Mouth swab
		Rat (USDA D)	Blood	Weekly	.25 mL	Tail artery draw

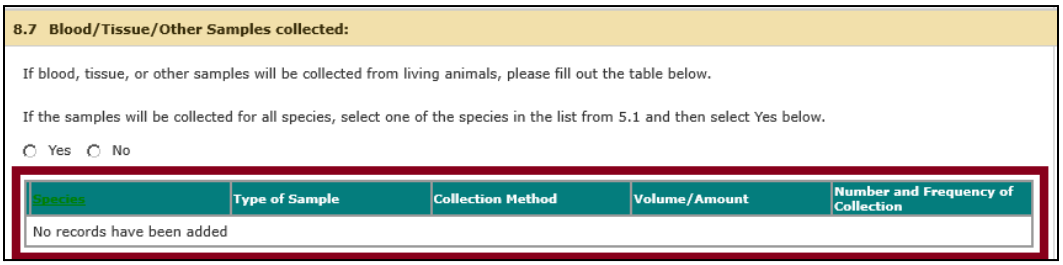
Fluid Extract List Implementation – Application Side

The fluid extract list is employed in the following areas on the application side of iRIS™.

IACUC / ARC Study Application — the Fluid Extract List is made available to an IACUC / ARC application via the **Add a New Fluid Extract to the Study** button



IACUC / ARC Study Application — the Fluid Extract List is made available to an IACUC / ARC application in the **Blood/Tissue/Other Samples collected** section



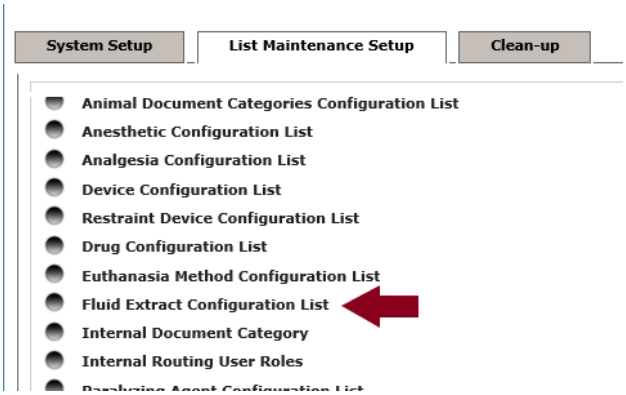
For more information about the IACUC study application, see the iRIS™ IACUC Assistant - IACUC Assistant Manual.

Fluid Extract List Implementation – Board Side

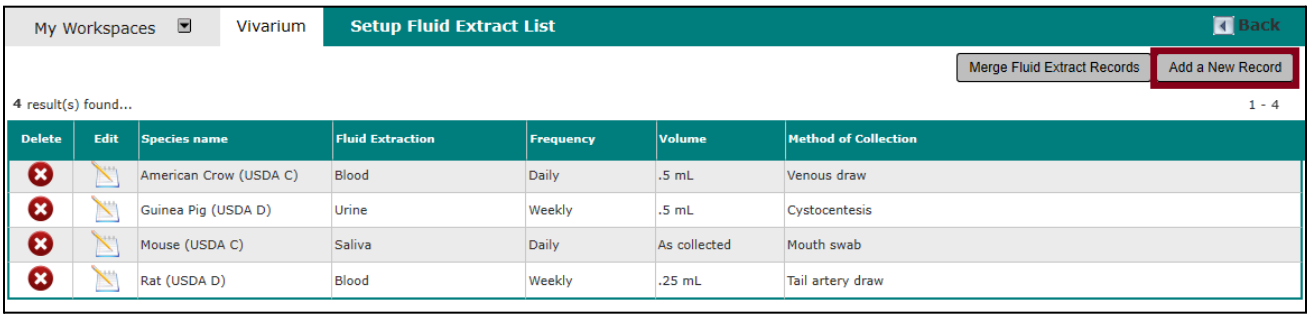
Fluid extracts are added on the application side where required and are not generally subject to direct revision by the board.

Add Fluid Extract

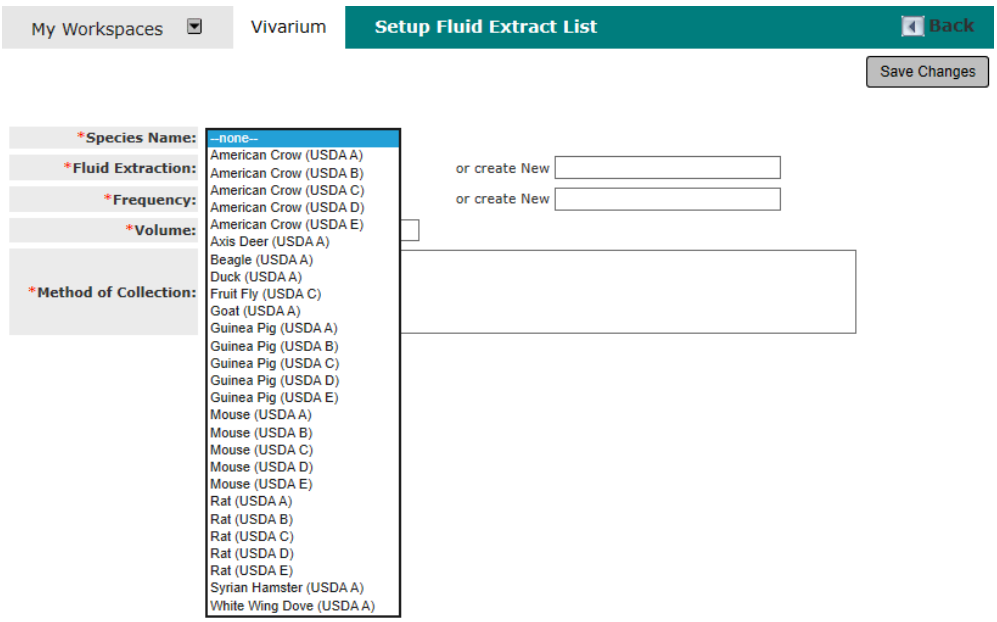
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Fluid Extract Configuration List** link.



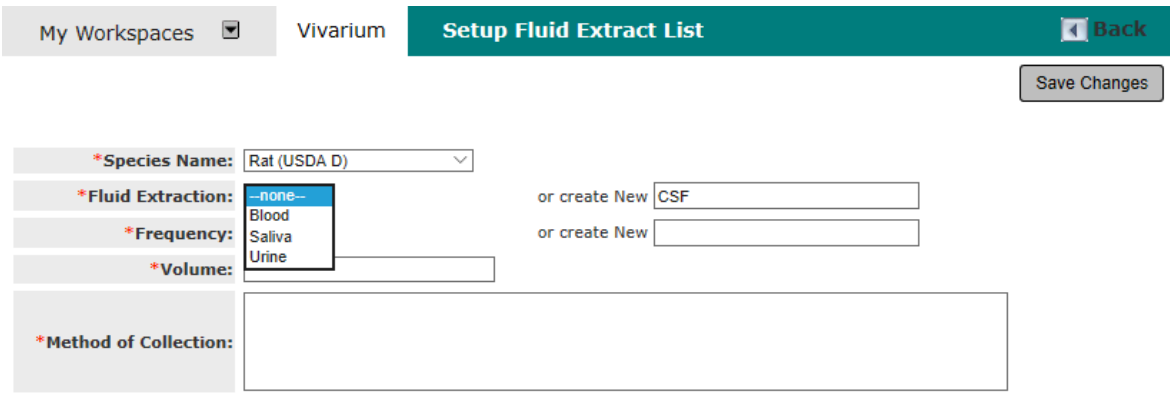
The **Setup Fluid Extract List** page is opened. Click the **Add a New Record** button.



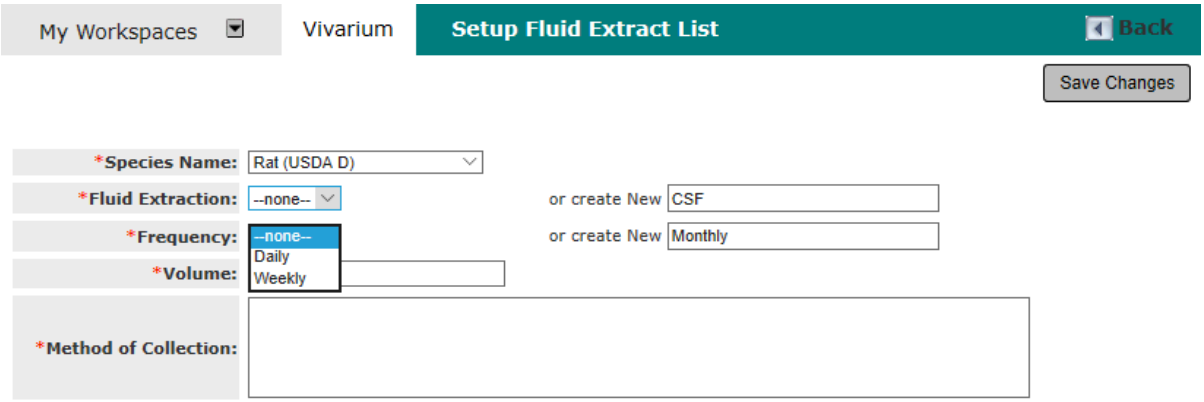
An add panel is opened for creation of the new record. Click on the **Species Name** dropdown list to open it and select the desired species.



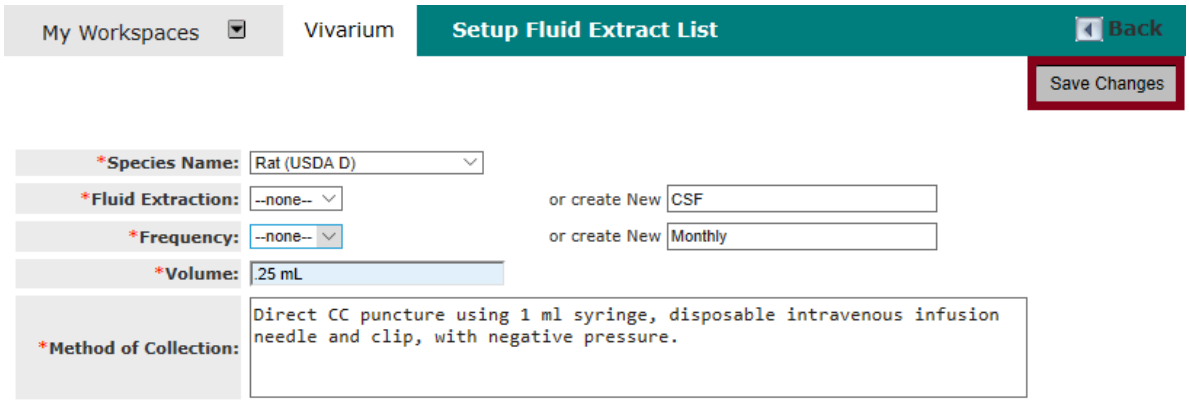
Click on the **Fluid Extraction** dropdown list to open it. If the desired item is not in the list, manually enter it in the **or create New** field directly to the right of the dropdown list.



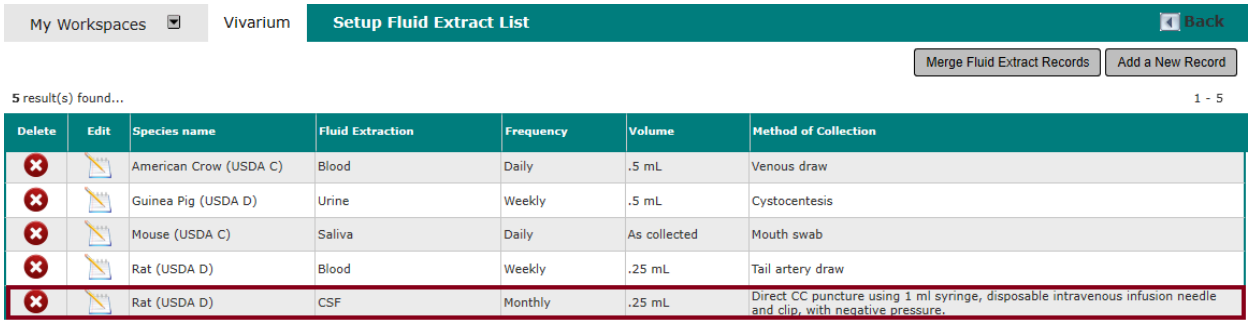
Click on the **Frequency** dropdown list to open it. If the desired item is not in the list, manually enter it in the **or create New** field directly to the right of the dropdown list.



Enter **Volume** and **Method of Collection** details, then click the **Save Changes** button to save the record and close the add panel.

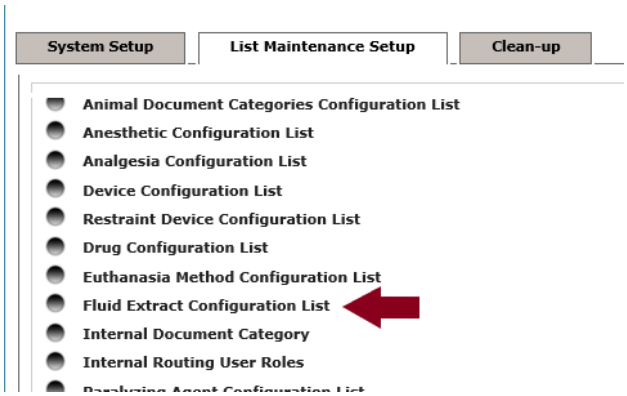


The new record is added on the **Setup Fluid Extract List** page.

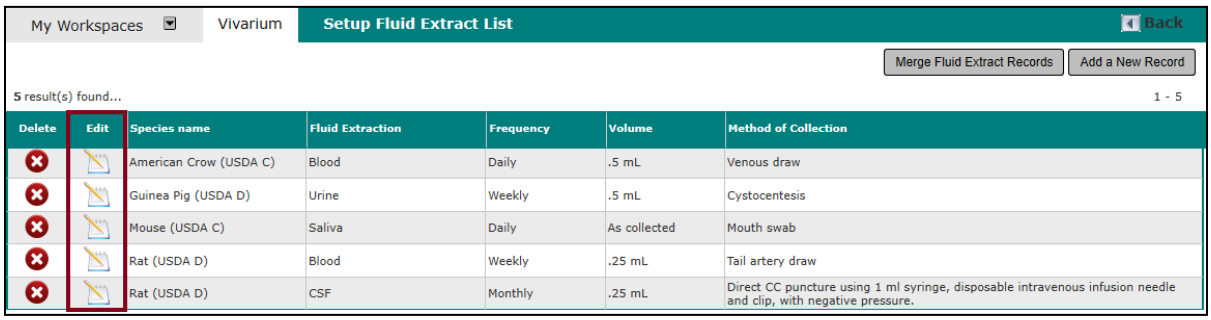


Edit Fluid Extract

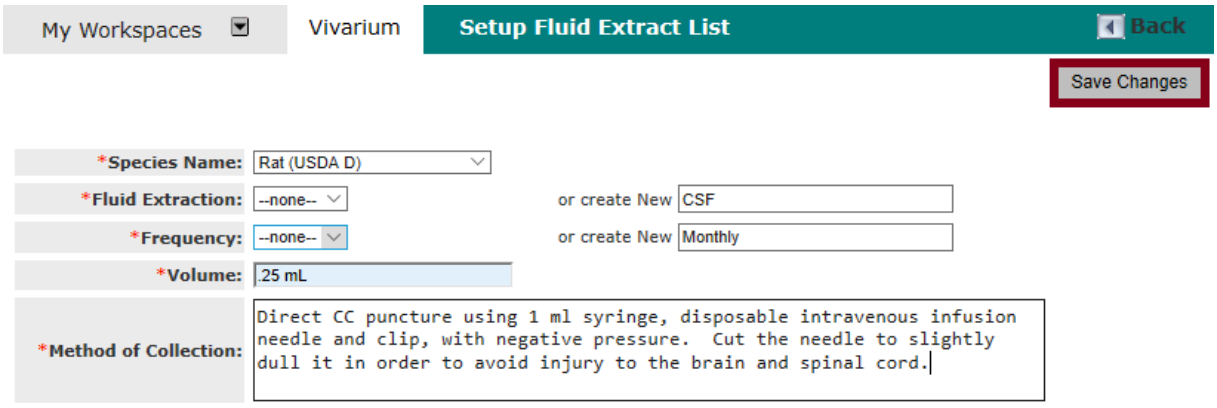
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Fluid Extract Configuration List** link.



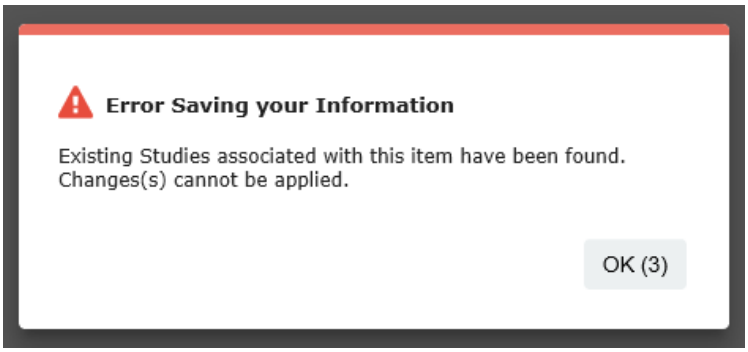
The **Setup Fluid Extract List** page is opened.



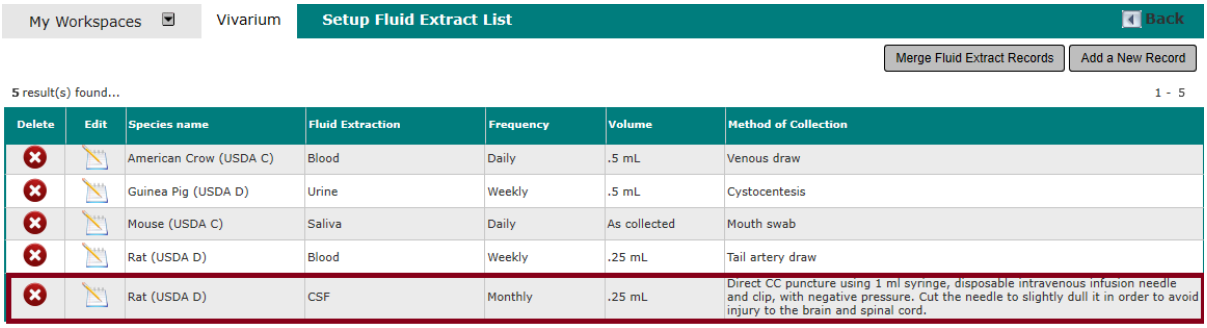
The record is opened in a panel with editable fields. Make desired changes and click the **Save Changes** button.



When an attempt is made to change the **Species Name** or **Fluid Extraction** in a fluid extract record that is already assigned to one or more studies, the following warning popup window appears and the record is not edited.



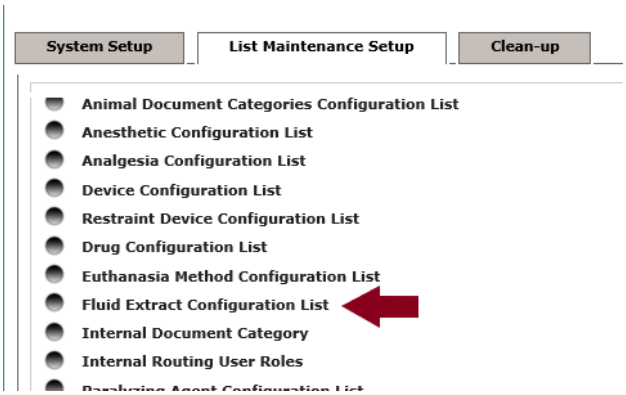
Otherwise, the record is revised on the **Setup Fluid Extract List** page.



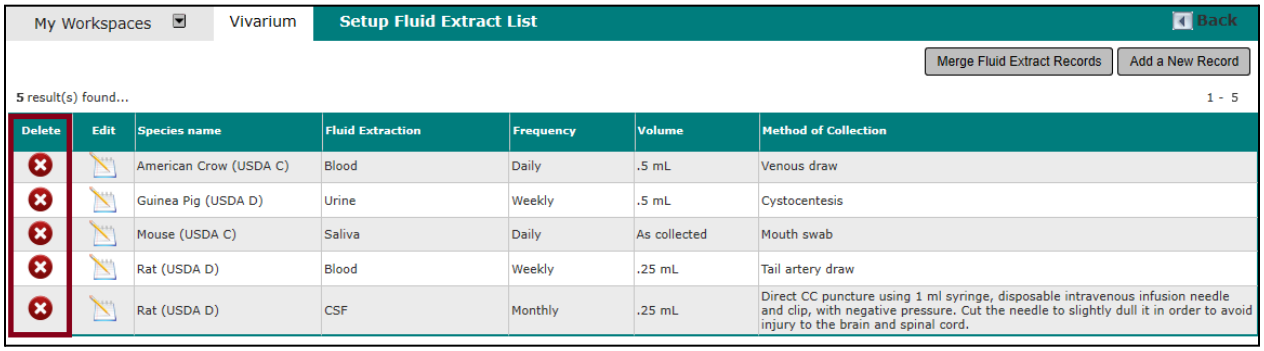
Delete	Edit	Species name	Fluid Extraction	Frequency	Volume	Method of Collection
		American Crow (USDA C)	Blood	Daily	.5 mL	Venous draw
		Guinea Pig (USDA D)	Urine	Weekly	.5 mL	Cystocentesis
		Mouse (USDA C)	Saliva	Daily	As collected	Mouth swab
		Rat (USDA D)	Blood	Weekly	.25 mL	Tail artery draw
		Rat (USDA D)	CSF	Monthly	.25 mL	Direct CC puncture using 1 ml syringe, disposable intravenous infusion needle and clip, with negative pressure. Cut the needle to slightly dull it in order to avoid injury to the brain and spinal cord.

Delete Fluid Extract

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Fluid Extract Configuration List** link.

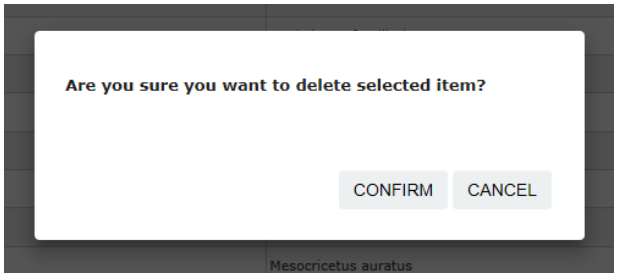


The **Setup Fluid Extract List** page is opened. Click the icon in the **Delete** column for the applicable record.



Delete	Edit	Species name	Fluid Extraction	Frequency	Volume	Method of Collection
		American Crow (USDA C)	Blood	Daily	.5 mL	Venous draw
		Guinea Pig (USDA D)	Urine	Weekly	.5 mL	Cystocentesis
		Mouse (USDA C)	Saliva	Daily	As collected	Mouth swab
		Rat (USDA D)	Blood	Weekly	.25 mL	Tail artery draw
		Rat (USDA D)	CSF	Monthly	.25 mL	Direct CC puncture using 1 ml syringe, disposable intravenous infusion needle and clip, with negative pressure. Cut the needle to slightly dull it in order to avoid injury to the brain and spinal cord.

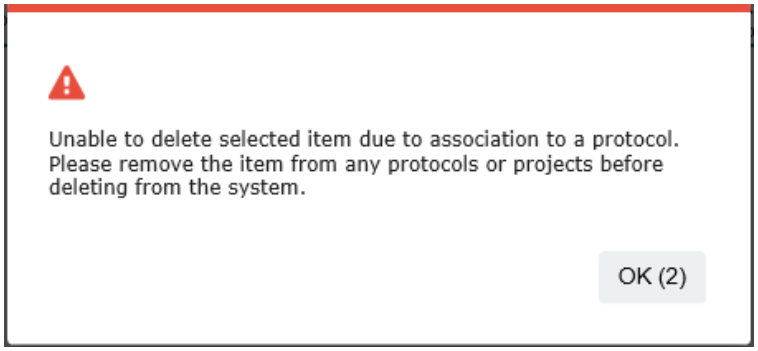
A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record and return to the **Setup Fluid Extract List** page.

Click **CONFIRM** to complete deletion of the record and return to the **Setup Fluid Extract List** page.

When an attempt is made to delete a fluid extract method already assigned to one or more studies, the following warning popup window appears and the record is not deleted.

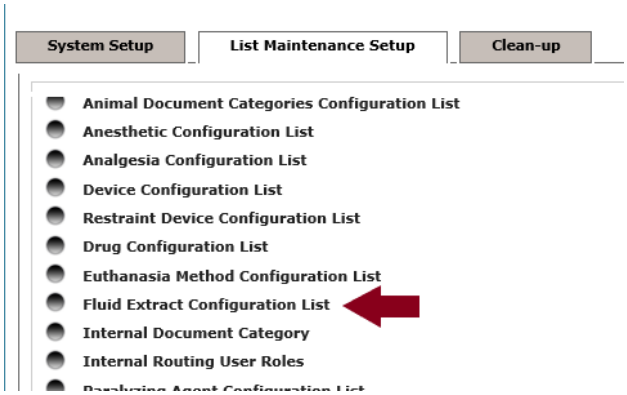


Merge Fluid Extracts

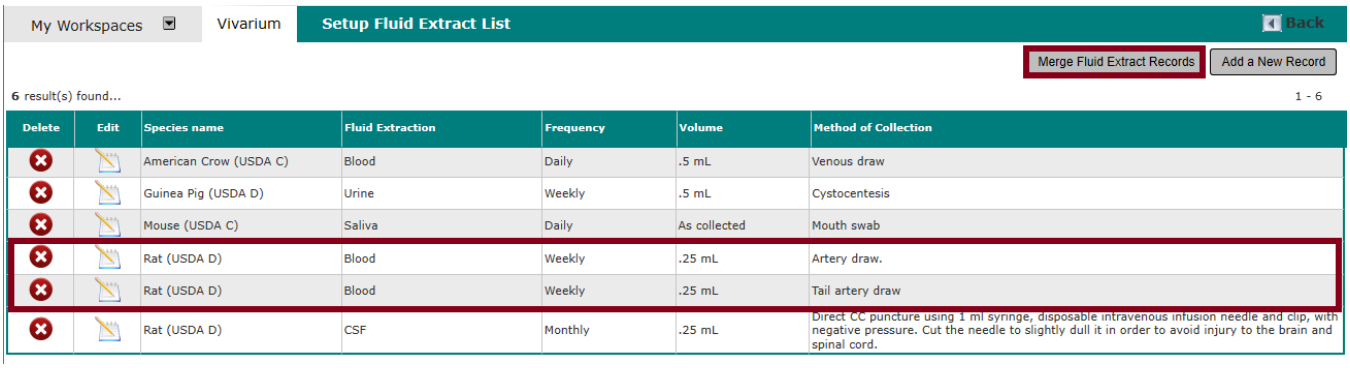
Sometimes a duplicate or erroneous fluid extract record is created and then assigned to one or more study applications before the mistake is caught.

In that situation, the duplicate or erroneous fluid extract record can be merged with a valid fluid extract record. The valid fluid extract record is then substituted for the duplicate/erroneous fluid extract record previously assigned to study applications.

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Fluid Extract Configuration List** link.

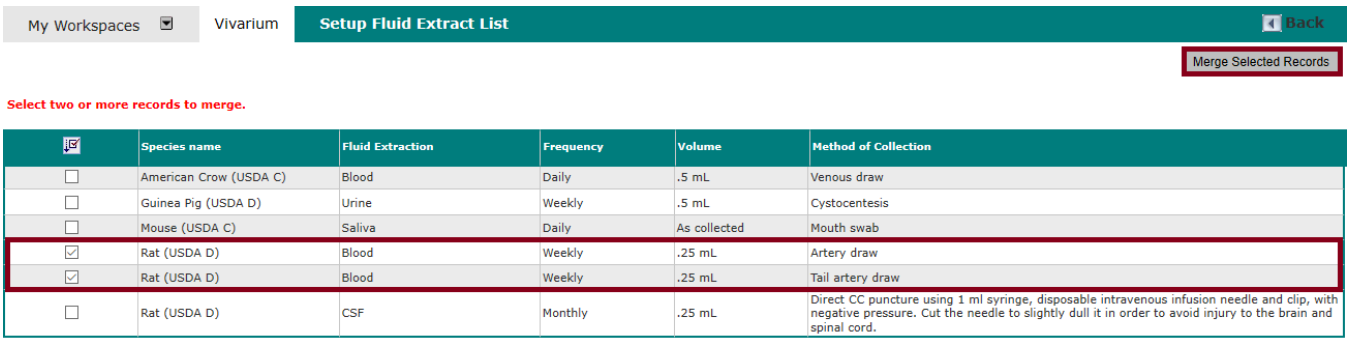


The **Setup Fluid Extract List** page is opened. Click the **Merge Fluid Extract Records** button.



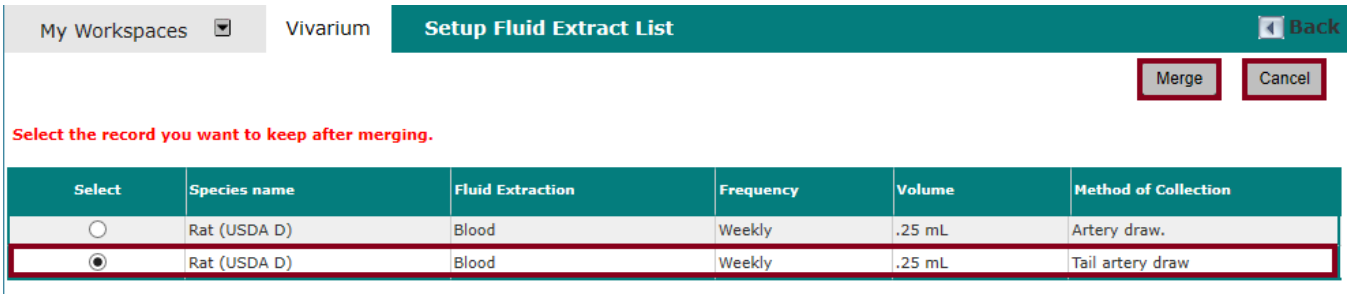
Delete	Edit	Species name	Fluid Extraction	Frequency	Volume	Method of Collection
		American Crow (USDA C)	Blood	Daily	.5 mL	Venous draw
		Guinea Pig (USDA D)	Urine	Weekly	.5 mL	Cystocentesis
		Mouse (USDA C)	Saliva	Daily	As collected	Mouth swab
		Rat (USDA D)	Blood	Weekly	.25 mL	Artery draw.
		Rat (USDA D)	Blood	Weekly	.25 mL	Tail artery draw
		Rat (USDA D)	CSF	Monthly	.25 mL	Direct CC puncture using 1 ml syringe, disposable intravenous infusion needle and clip, with negative pressure. Cut the needle to slightly dull it in order to avoid injury to the brain and spinal cord.

In the example shown above, the first fluid extract record for "Rat (USDA D)" was created in error. This record may have been assigned to one or more studies and must be merged with the second fluid extract record for "Rat (USDA D)". Click the **Merge Fluid Extract Records** button to begin. A merge panel opens.



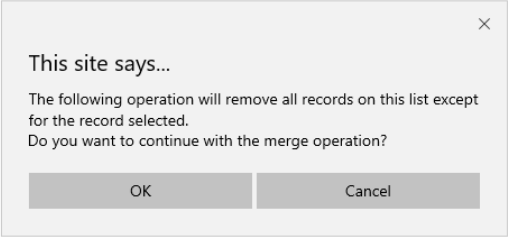
	Species name	Fluid Extraction	Frequency	Volume	Method of Collection
☐	American Crow (USDA C)	Blood	Daily	.5 mL	Venous draw
☐	Guinea Pig (USDA D)	Urine	Weekly	.5 mL	Cystocentesis
☐	Mouse (USDA C)	Saliva	Daily	As collected	Mouth swab
☑	Rat (USDA D)	Blood	Weekly	.25 mL	Artery draw
☑	Rat (USDA D)	Blood	Weekly	.25 mL	Tail artery draw
☐	Rat (USDA D)	CSF	Monthly	.25 mL	Direct CC puncture using 1 ml syringe, disposable intravenous infusion needle and clip, with negative pressure. Cut the needle to slightly dull it in order to avoid injury to the brain and spinal cord.

Select the checkboxes at far left for the records to be merged and click the **Merge Selected Records** button. A new panel opens with only the selected records listed.

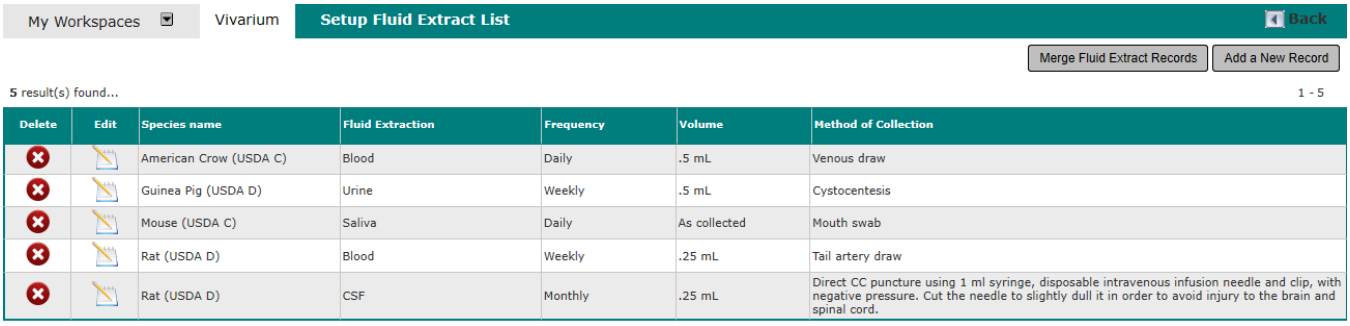


Click the **Cancel** button to close the panel without merging the records.

Note the red instruction text above the table: select the radio button at far left for the record to be KEPT, then click the **Merge** button. A confirmation popup window appears.

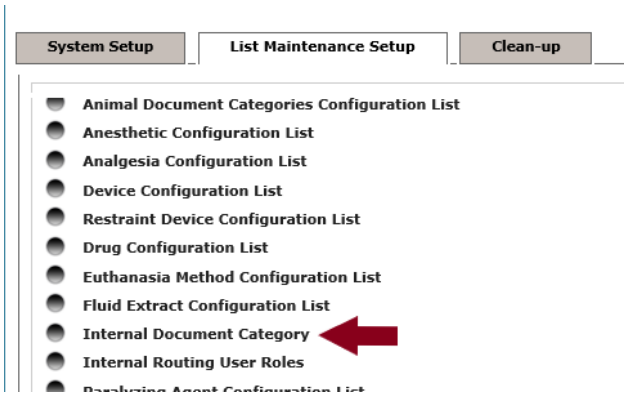


As the popup states, all records on the list will be deleted except for the selected record. Click **Cancel** to close the popup without merging the records. Click **OK** to complete the merge and return to the **Setup Fluid Extract List** page, where the merge can be confirmed.

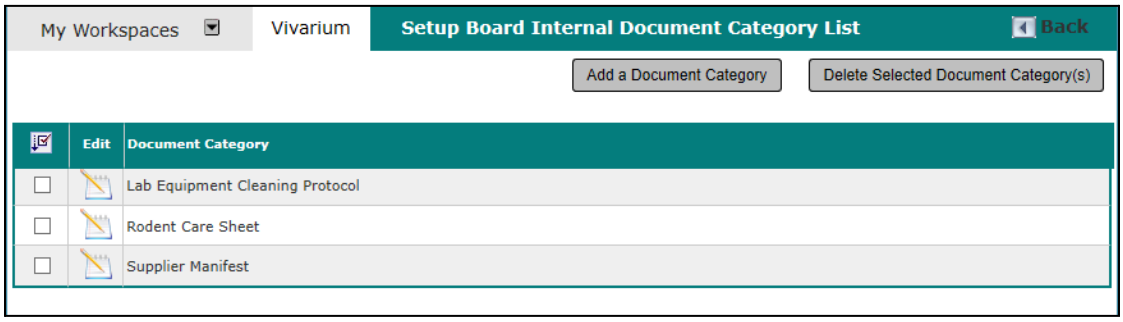


Internal Document Category

The Internal Document Category list is where a list of standard, internal review board documents is maintained. To view the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Internal Document Category** link.



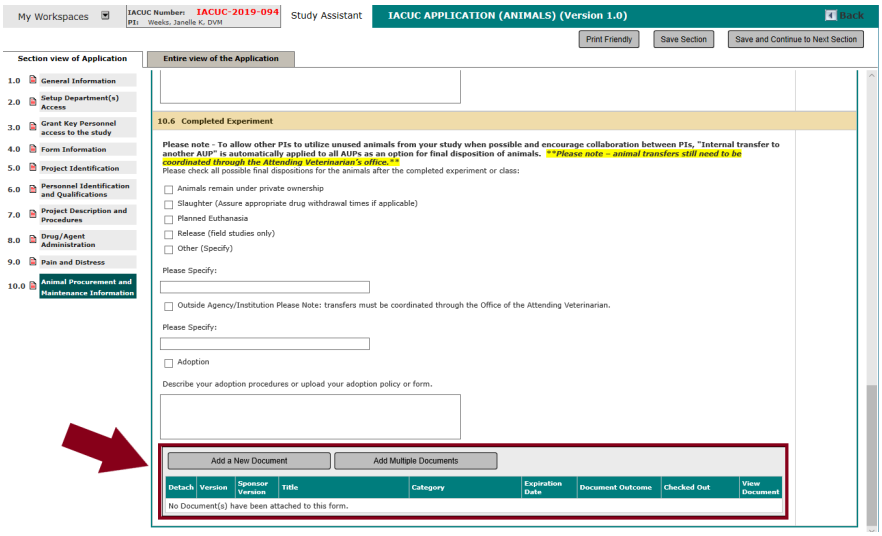
The **Setup Board Internal Document Category List** page is opened.



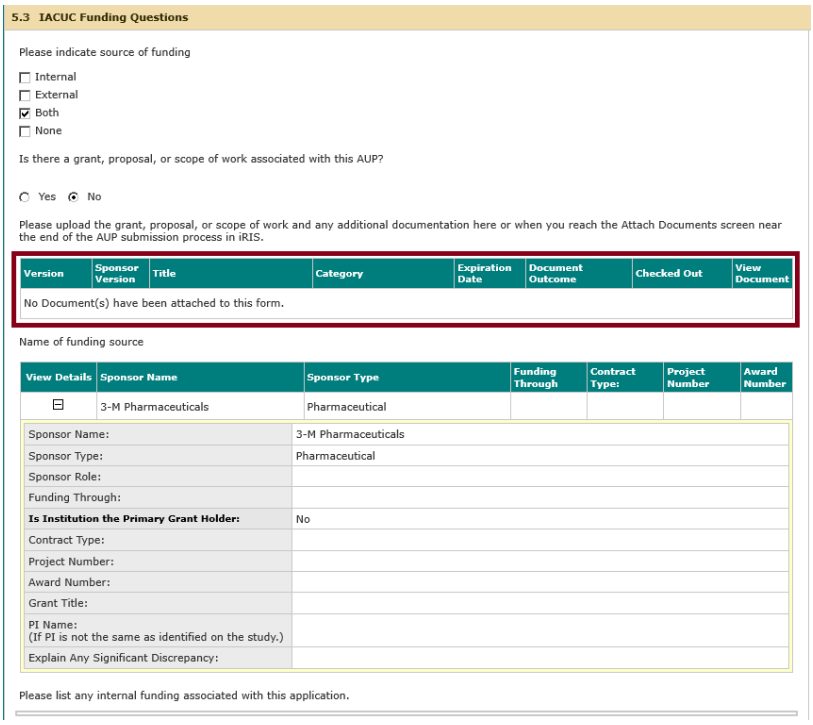
Internal Document List Implementation – Application Side

The internal document list is employed in the following areas on the application side of iRIS™.

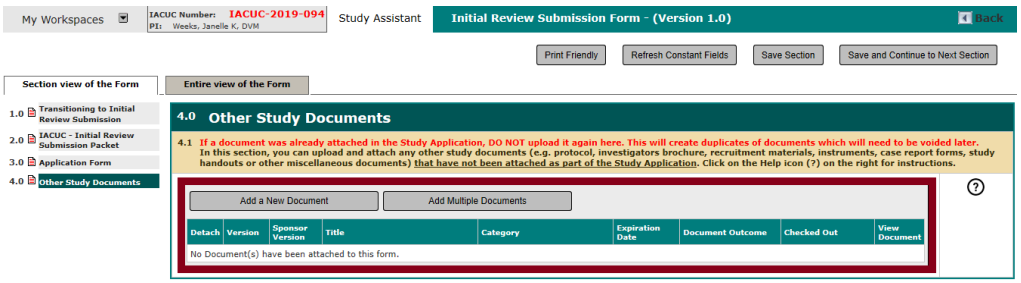
Animal Procurement and Maintenance Information section — any supporting document(s) pertaining to animal subject adoption procedures can be added to an IACUC / ARC study in the **Completed Experiment** section of the application form



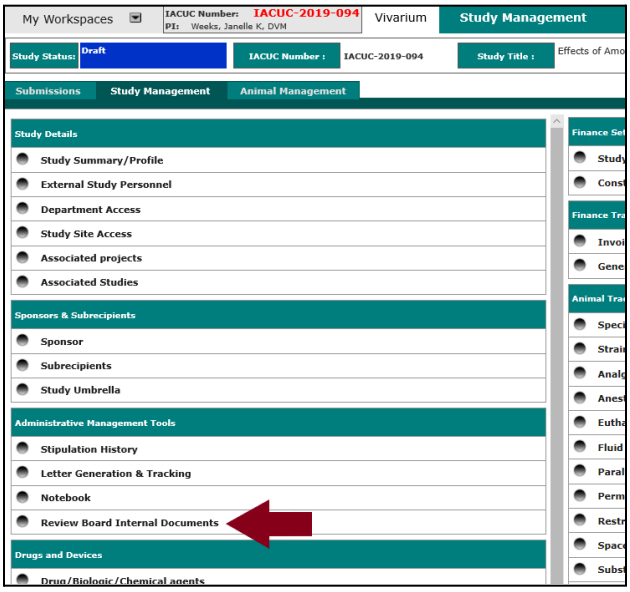
IACUC Funding Questions — any supporting document pertaining to IACUC funding can be added to an IACUC / ARC study in the **IACUC Funding Questions** section of the application form



Initial Review Submission Form — internal study documents can be attached to the application in the **Other Study Documents** section



Review Board Internal Documents — Review Board Internal Documents added to a study can be accessed on the application side via IACUC/Animal Resource Center > Find a Study > [study opened] > Study Management tab > Study Summary/Profile link > Study Management tab > Review Board Internal Documents link

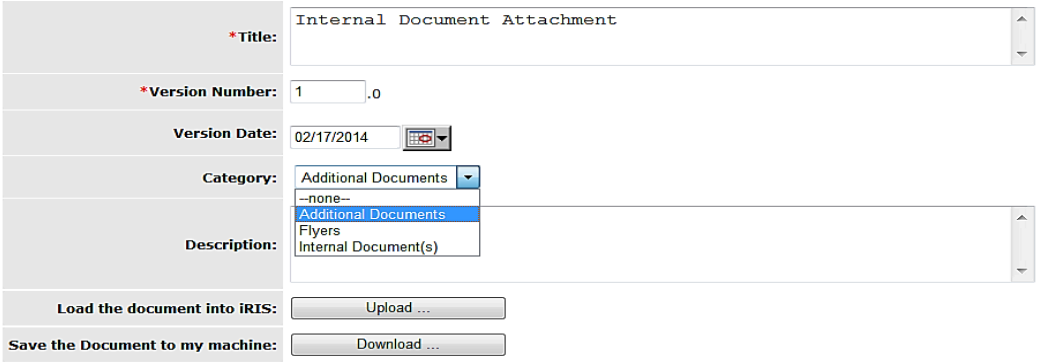


For more information about the IACUC study application, see the iRIS™ IACUC Assistant - IACUC Assistant Manual.

Internal Document List Implementation – Board Side

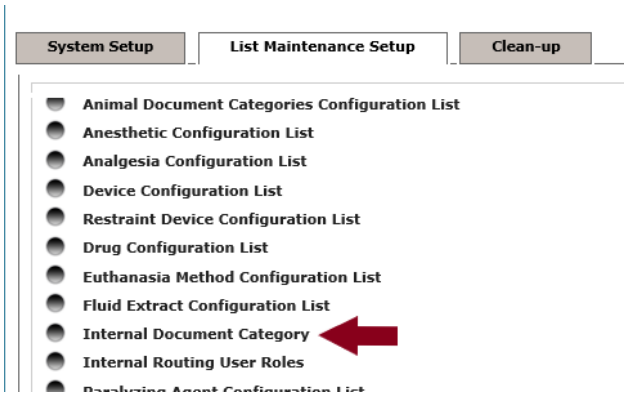
The internal document list is employed in the following areas on the review board / system setup side of iRIS™.

Review Board Internal Documents add form — board members can add internal documents via the Review Board Internal Documents add form

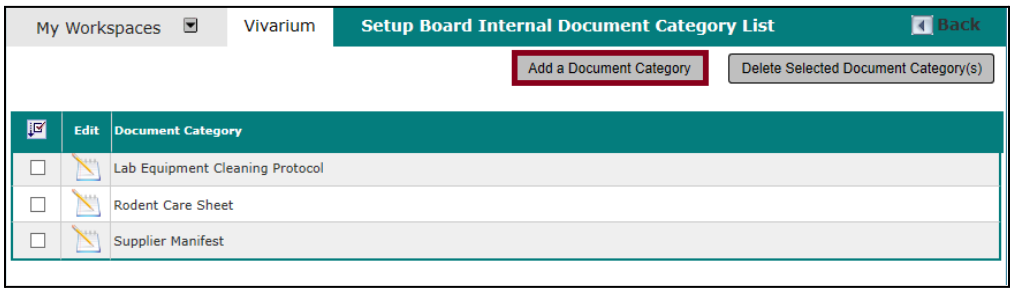


Add Internal Document Category

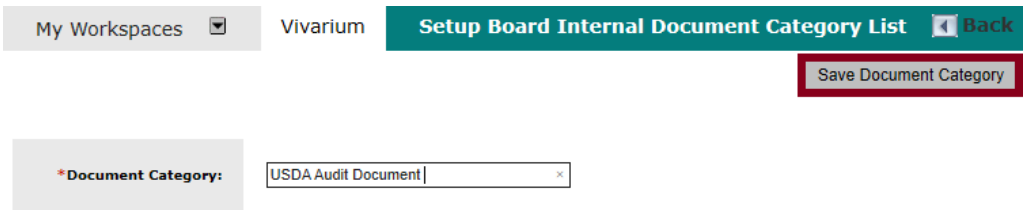
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Internal Document Category** link.



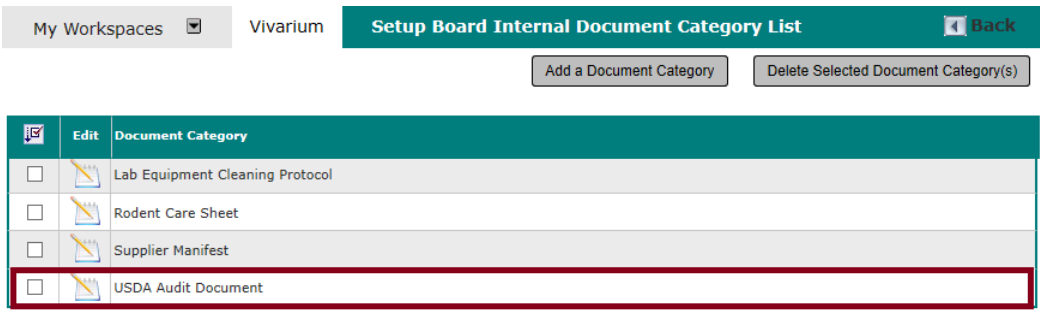
The **Setup Board Internal Document Category List** page is opened. Click the **Add a Document Category** button.



An add panel is opened for creation of the new record. Enter the new **Document Category** and click the **Save Document Category** button.

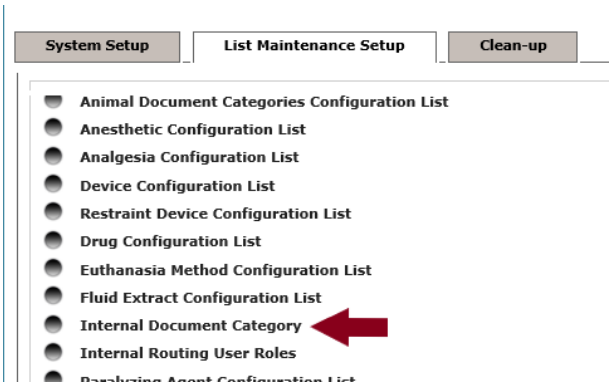


The record is added to the list on the main **Setup Board Internal Document Category List** page.

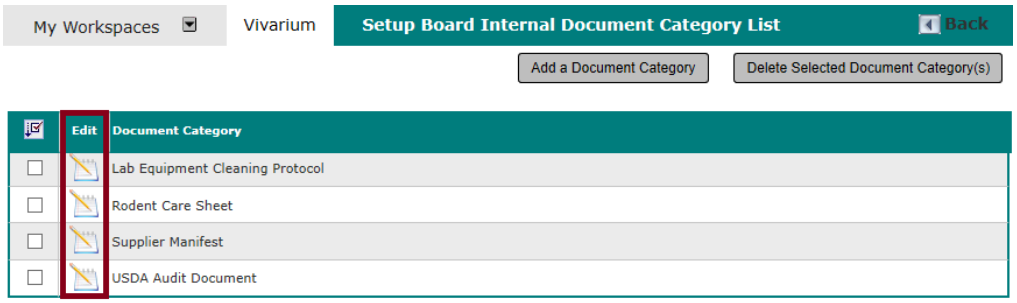


Edit Internal Document Category

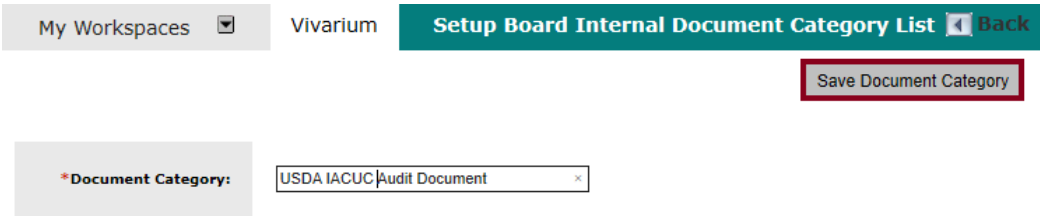
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Internal Document Category** link.



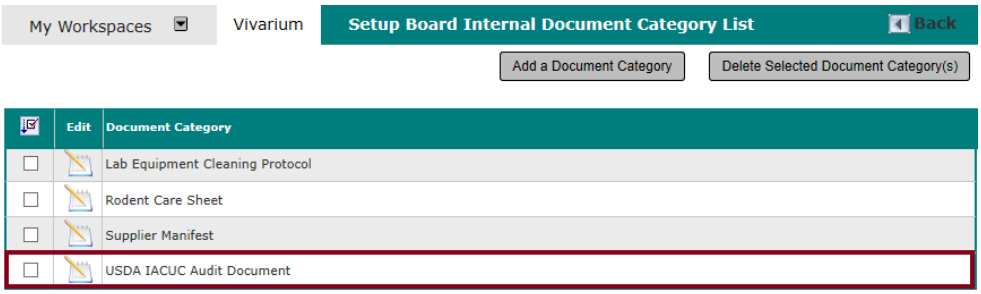
The **Setup Board Internal Document Category List** page is opened. Click the icon in the **Edit** column for the applicable record.



An edit panel is opened. Enter desired changes and click the **Save Document Category** button.

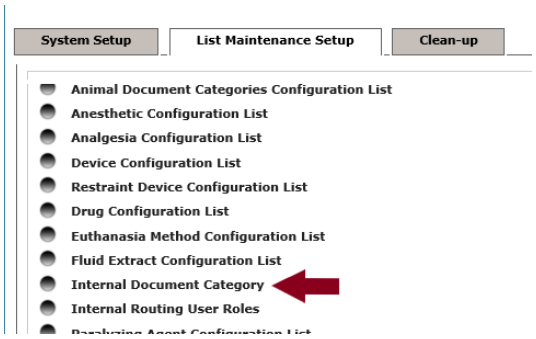


The record is revised on the main **Setup Board Internal Document Category List** page.

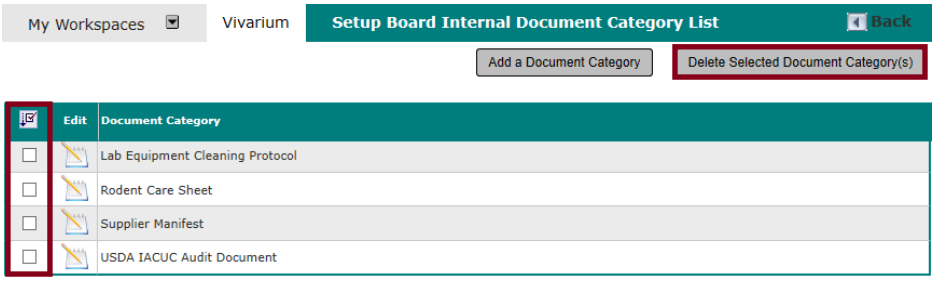


Delete Internal Document Category

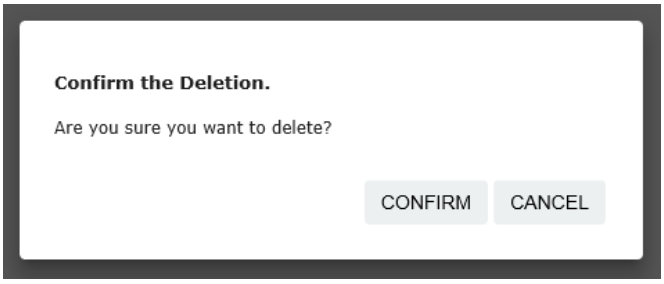
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Internal Document Category** link.



The **Setup Board Internal Document Category List** page is opened. Select the checkbox in the far-left column for the applicable record and click the **Delete Selected Document Category(s)** button.



A confirmation popup window appears.

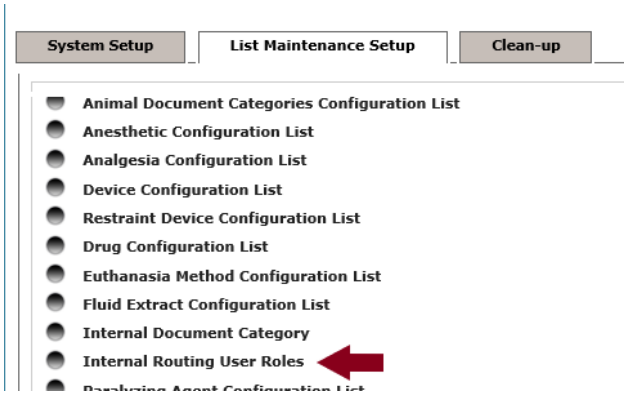


Click **CANCEL** to close the popup without deleting the record.

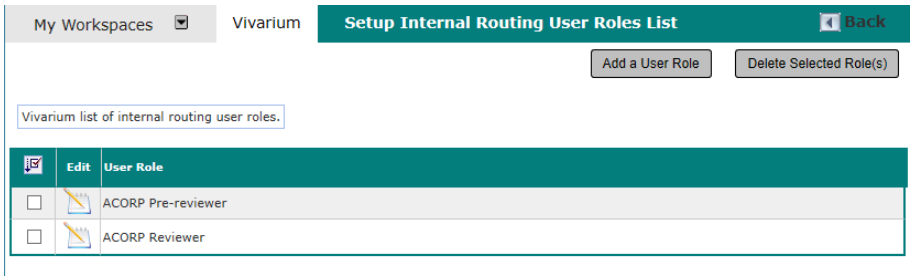
Click **CONFIRM** to delete the record and close the popup. The record is deleted from the list on the main **Setup Board Internal Document Category List** page.

Internal Routing User Roles

The Internal Routing User Roles list is where a list of study roles involved in study document review and signoff is maintained. To view the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Internal Routing User Roles** link.



The **Setup Internal Routing User Roles List** page is opened.



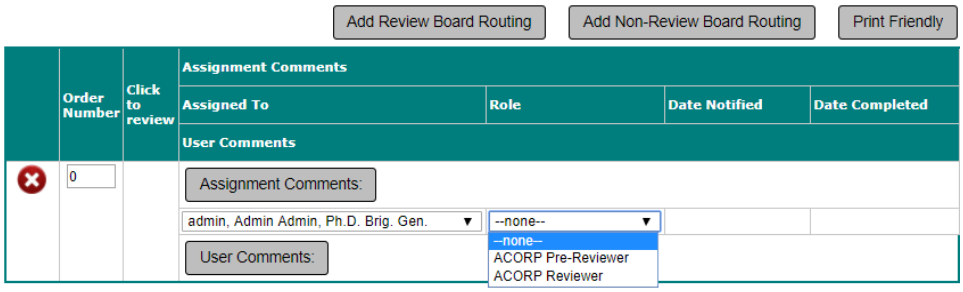
Note: the review board property rb.useReviewRouting_user_role must be set to "Yes" in order to use the Internal Routing User Roles feature.

Internal Routing User Role List Implementation – Application Side

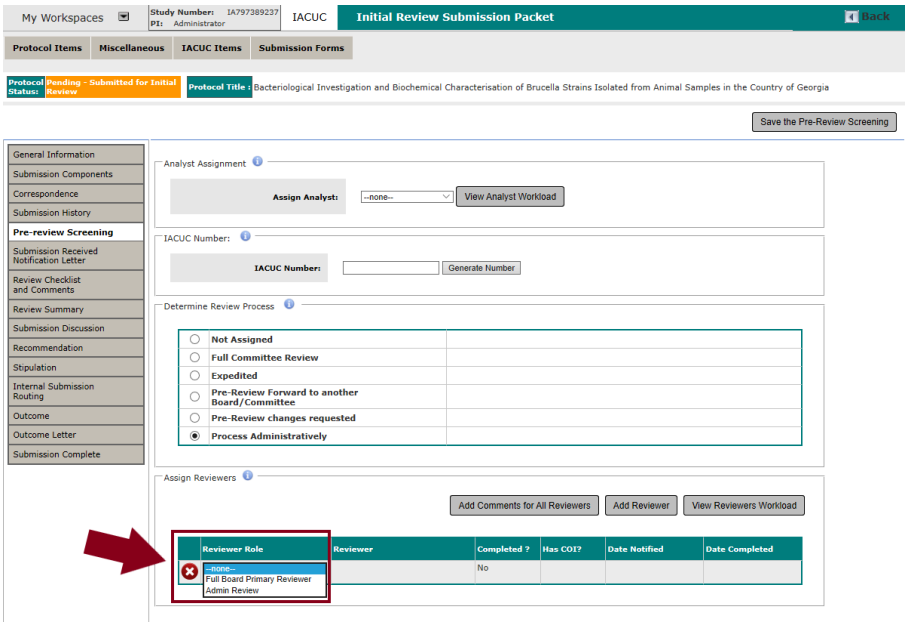
Note: the review board property rb.useReviewRouting_user_role must be set to "Yes" in order to use the Internal Routing User Roles feature.

The internal routing user role list is employed in the following areas on the application side of iRIS™.

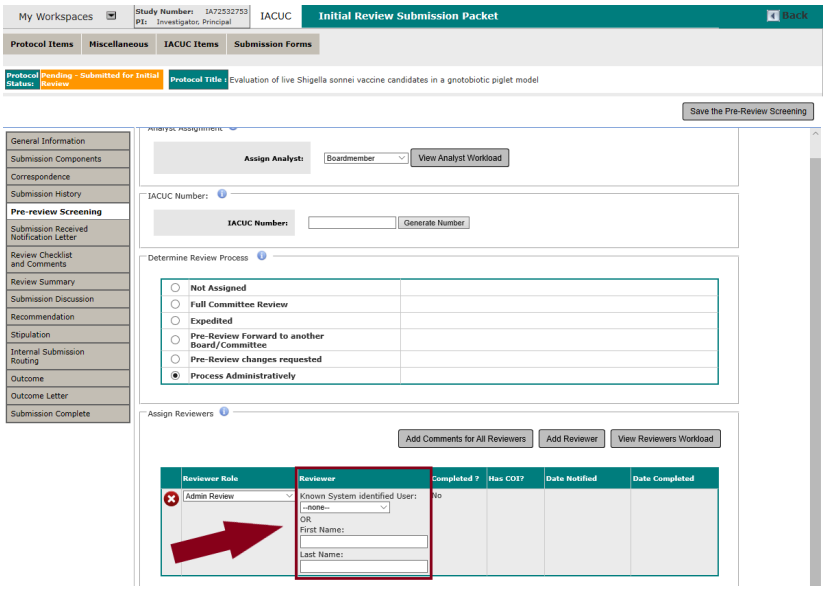
IACUC / ARC Study Application — the internal routing user role dropdown is employed when making internal routing assignments for a submission



IACUC / ARC Study Application — the internal routing user role dropdown is employed in the **Assign Reviewers** section of the **Pre-review Screening** tab



Note that selection of an Ad Hoc reviewer role unlocks fields for selection of a named reviewer.



For more information about the IACUC study application, see the iRIS™ IACUC Assistant - IACUC Assistant Manual.

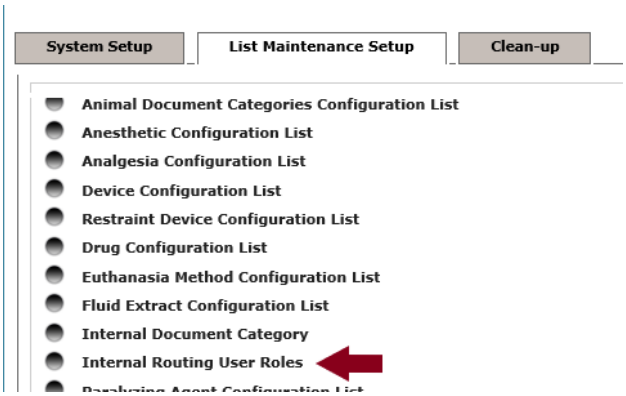
Internal Routing User Role List Implementation – Board Side

The internal routing user role list is utilized during Pre-Review screening, as described in the previous section, and routing assignments made at that time are not generally subject to direct revision by the board.

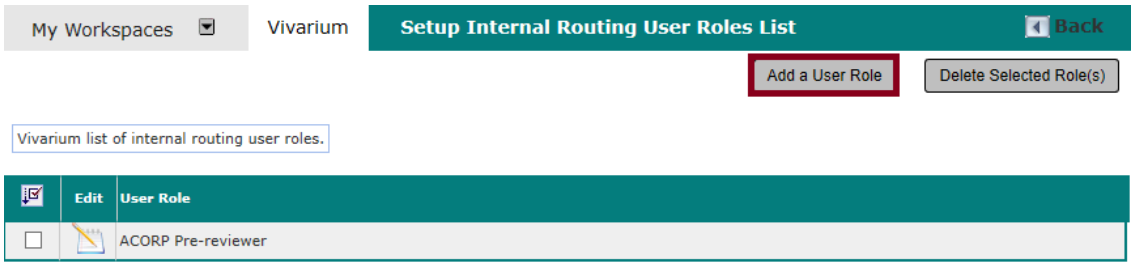
Add Internal Routing User Role

Note: the review board property rb.useReviewRouting_user_role must be set to "Yes" in order to use the Internal Routing User Roles feature.

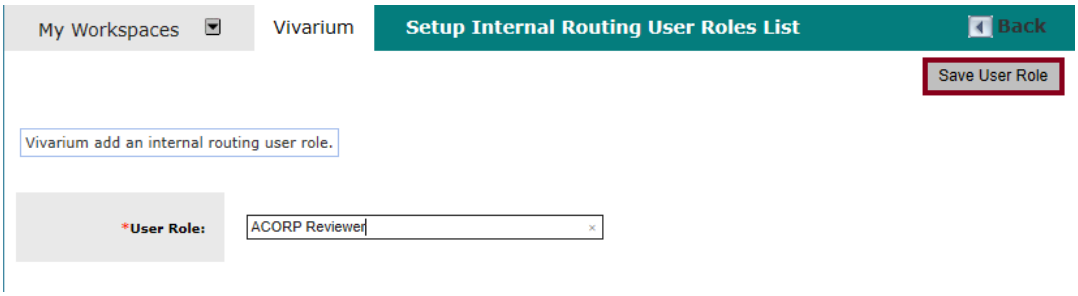
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Internal Routing User Roles** link.



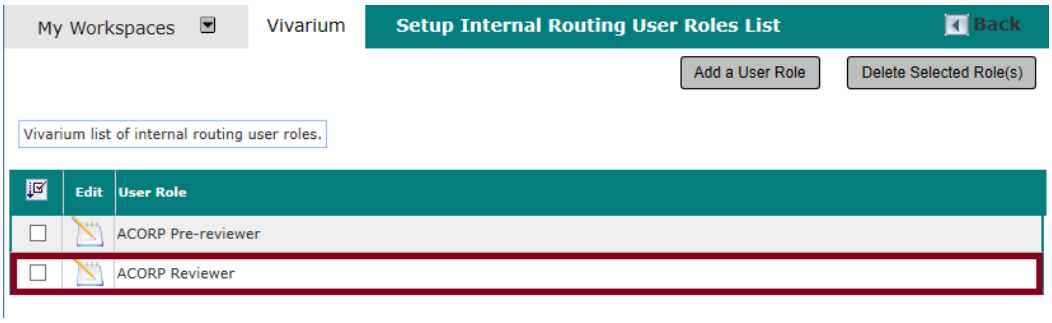
The **Setup Internal Routing User Roles List** page is opened. Click the **Add a User Role** button.



An **add an internal routing user role** panel is opened for creation of the new record. Enter the new **User Role** and click the **Save User role** button.



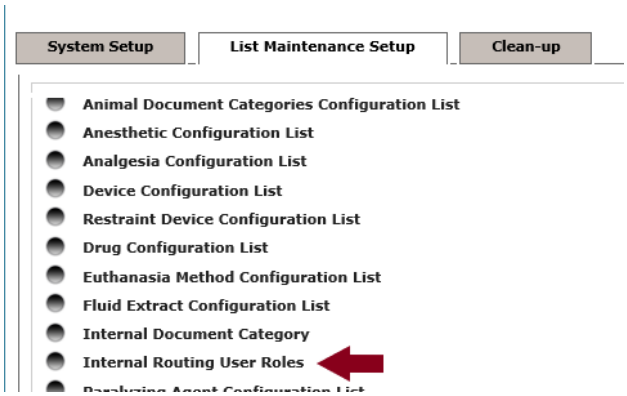
The add panel is closed and the record is added to the list on the **Setup Internal Routing User Roles List** page.



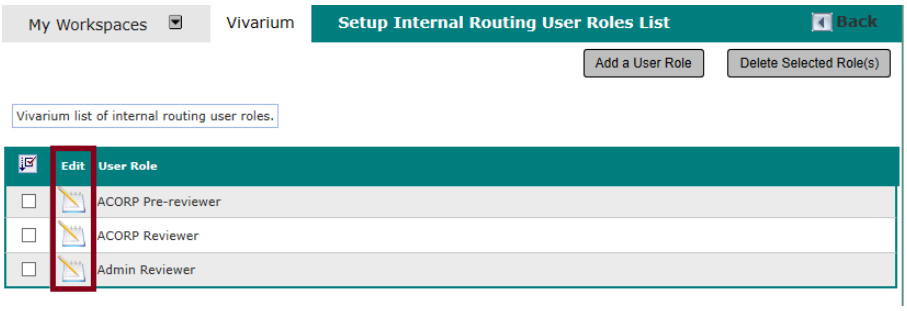
Edit Internal Routing User Role

Note: the review board property rb.useReviewRouting_user_role must be set to "Yes" in order to use the Internal Routing User Roles feature.

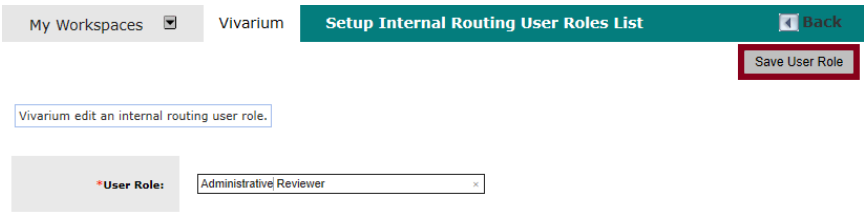
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Internal Routing User Roles** link.



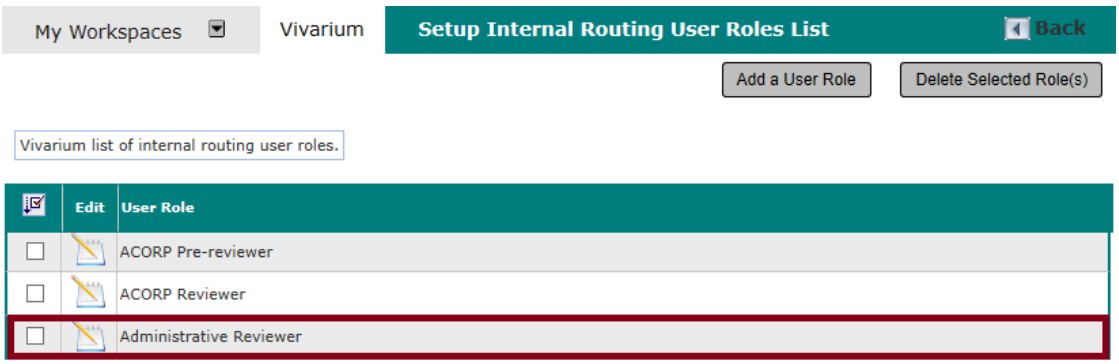
The **Setup Internal Routing User Roles List** page is opened. Click the icon in the **Edit** column for the applicable record.



An **edit an internal routing user role** panel is opened. Enter desired changes and click the **Save User Role** button.



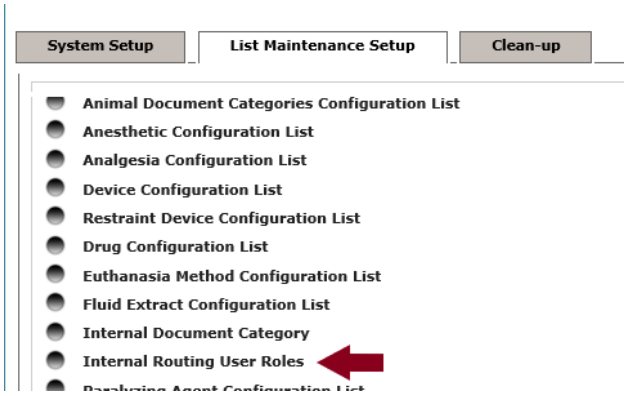
The edit panel is closed and the record is revised on the **Setup Internal Routing User Roles List** page.



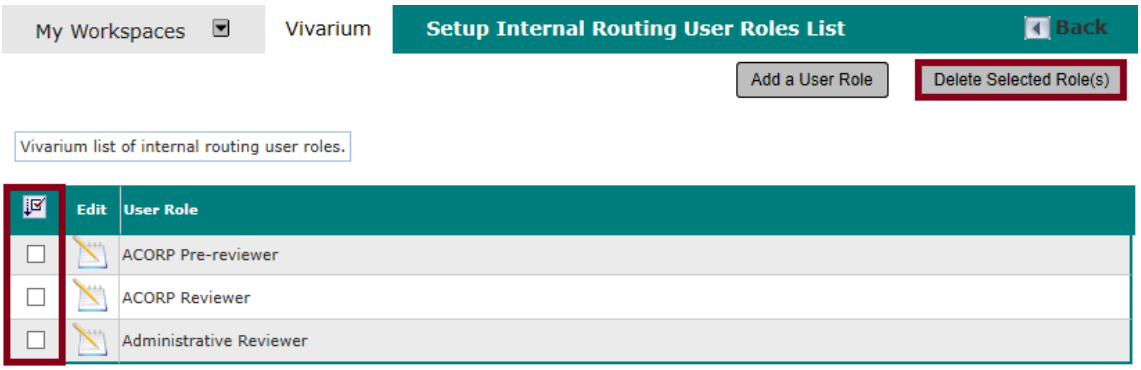
Delete Internal Routing User Role

Note: the review board property rb.useReviewRouting_user_role must be set to "Yes" in order to use the Internal Routing User Roles feature.

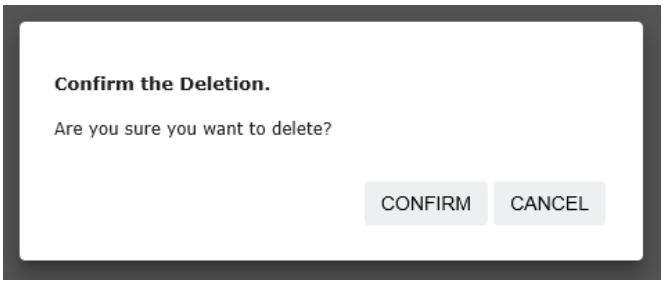
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Internal Routing User Roles** link.



The **Setup Internal Routing User Roles List** page is opened. Select the checkbox(es) in the far-left column for the record(s) to be deleted and click the **Delete Selected Role(s)** button.



A confirmation popup window appears.

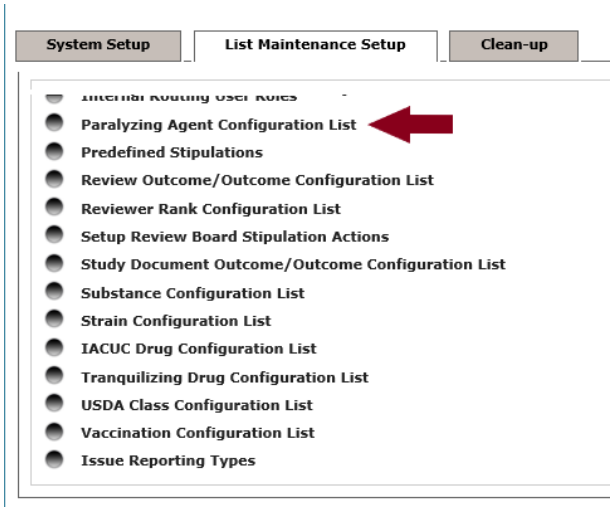


Click **CANCEL** to close the popup without deleting the record.

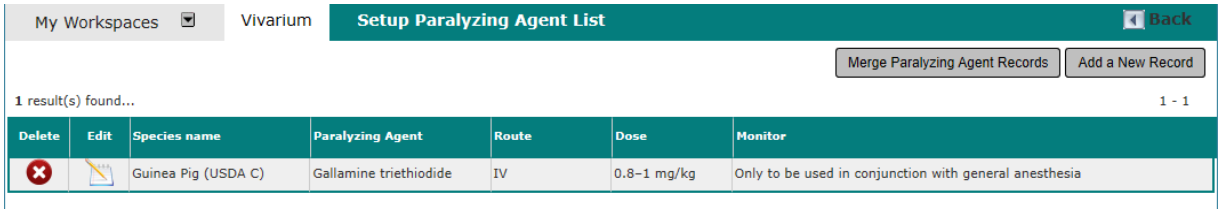
Click **CONFIRM** to delete the record and close the popup. The record is deleted from the list on the main **Setup Internal Routing User Roles List** page.

Paralyzing Agent Configuration List

The Paralyzing Agent Configuration List is where a list of paralytic agents approved by the institution for use in animal studies is maintained in the iRIS™ system. To view the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Paralyzing Agent Configuration List** link.



The **Setup Paralyzing Agent List** page is opened.



Paralyzing Agent List Implementation – Application Side

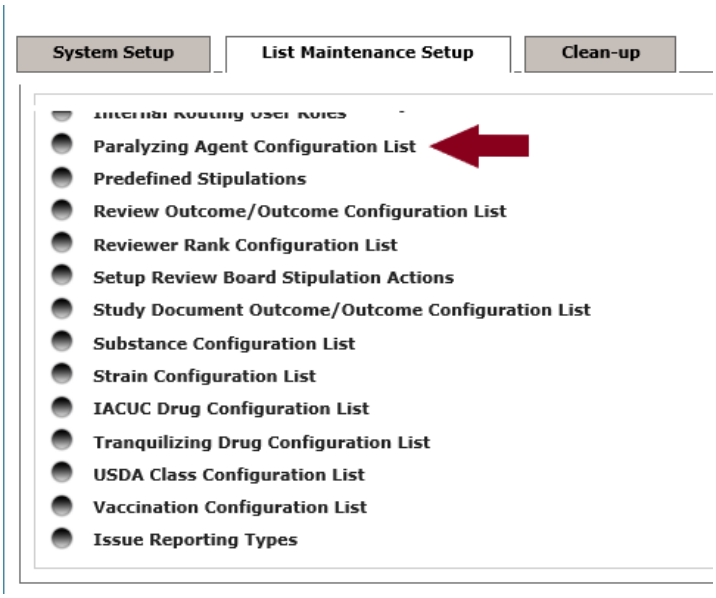
Where this field is in use by the institution, it appears in the study application form.

Paralyzing Agent List Implementation – Board Side

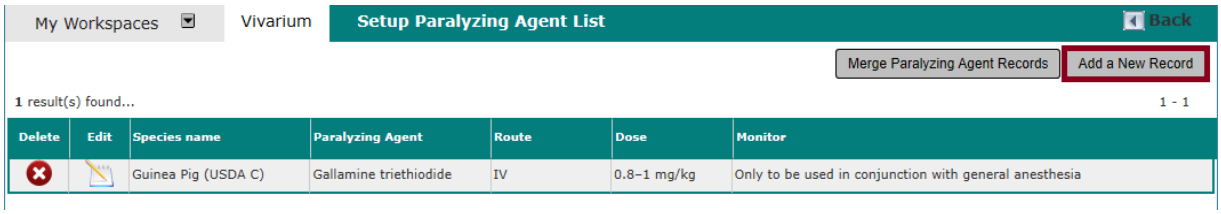
Paralyzing agents are added on the application side where required and are not generally subject to direct revision by the board.

Add Paralyzing Agent

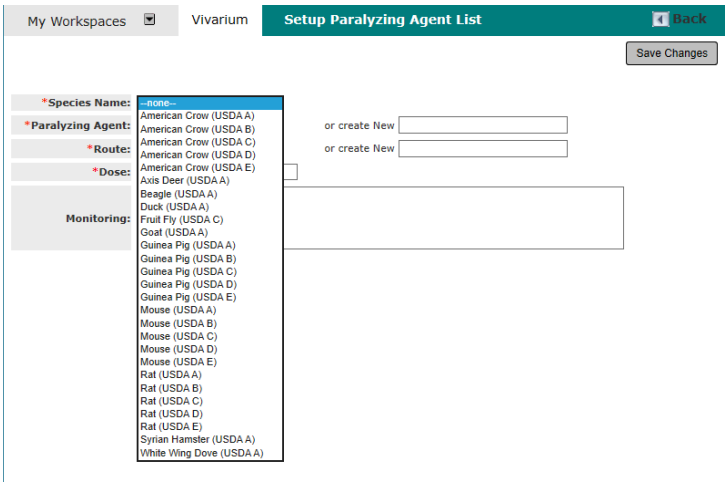
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Setup Paralyzing Agent Configuration List** link.



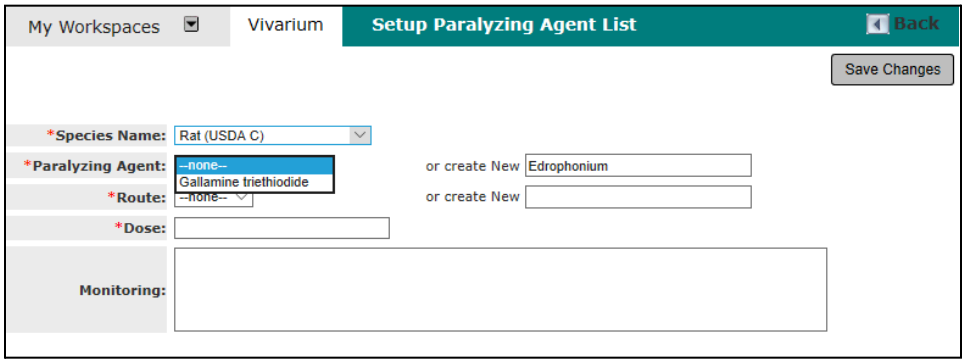
The **Setup Paralyzing Agent List** page is opened. Click the **Add a New Record** button.



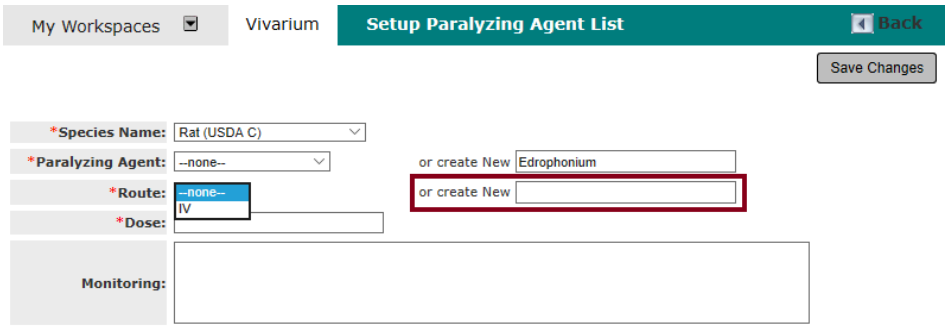
An add panel is opened for creation of the new record. Click on the **Species Name** dropdown list to open it and select the desired species.



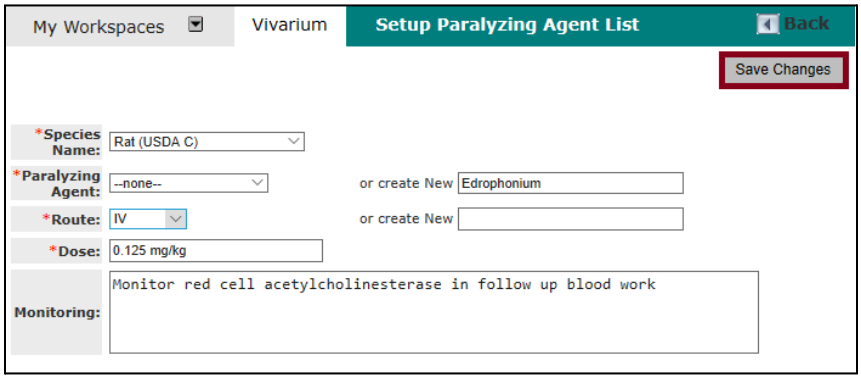
Click on the **Paralyzing Agent** dropdown list to open it. If the desired item is not in the list, manually enter it in the **or create New** field directly to the right of the dropdown list.



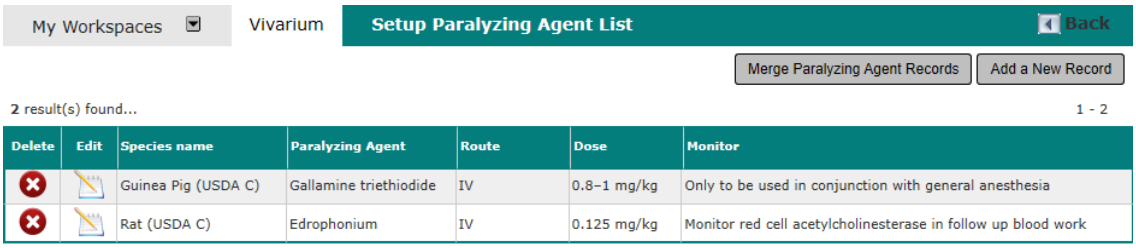
Click on the **Route** dropdown list to open it. If the desired item is not in the list, manually enter it in the **or create New** field directly to the right of the dropdown list.



Enter **Dose** and **Monitoring** details, then click the **Save Changes** button to save the record and close the add panel.

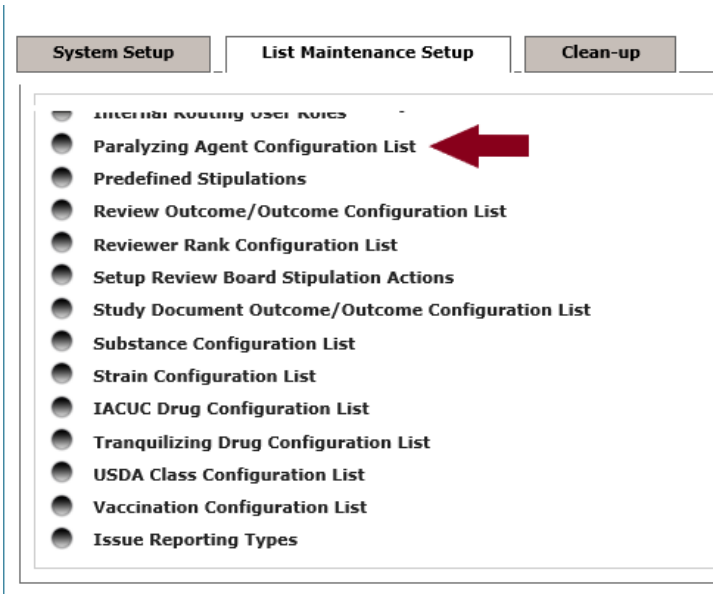


The new record is added on the **Setup Paralyzing Agent List** page.

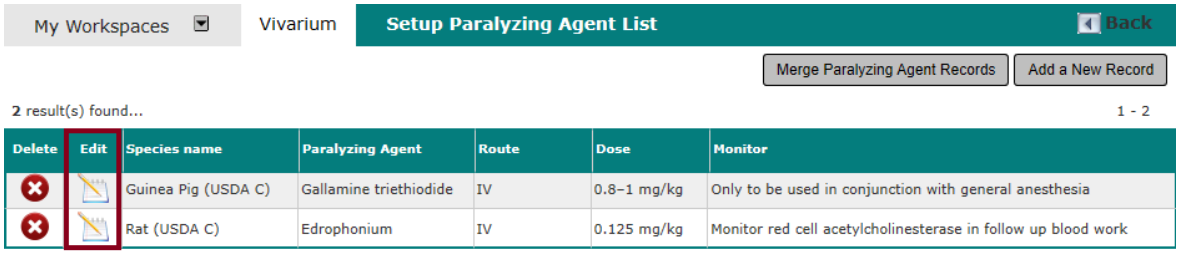


Edit Paralyzing Agent

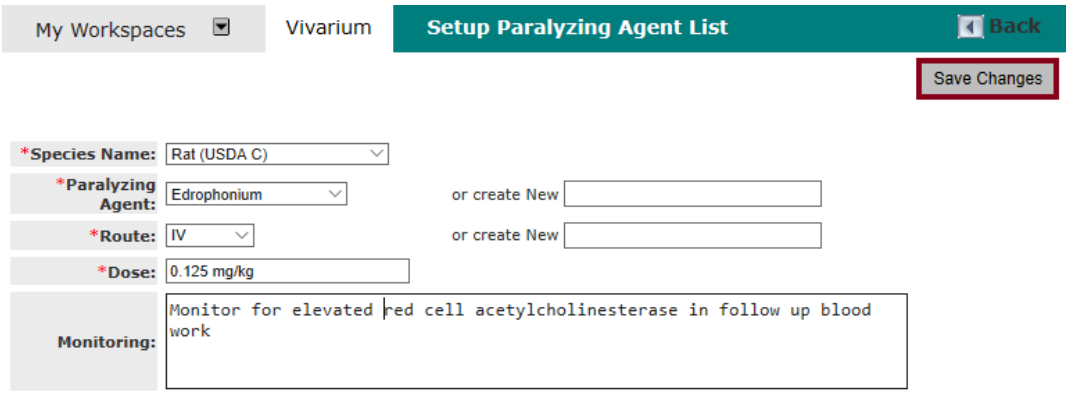
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Paralyzing Agent Configuration List** link.



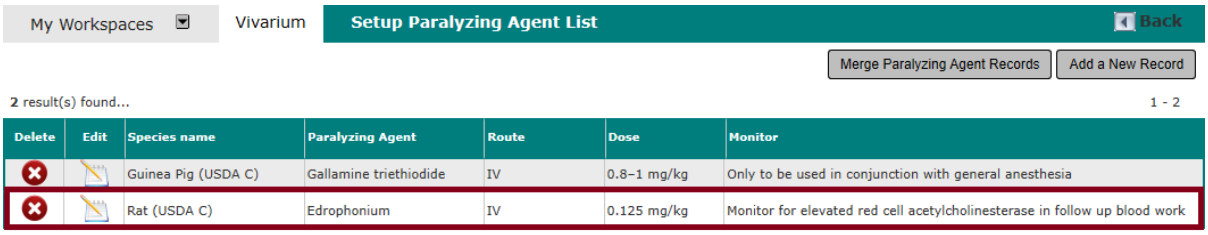
The **Setup Paralyzing Agent List** page is opened. Click the icon in the **Edit** column for the applicable record.



The record is opened in an edit panel. Make desired changes and click the **Save Changes** button.

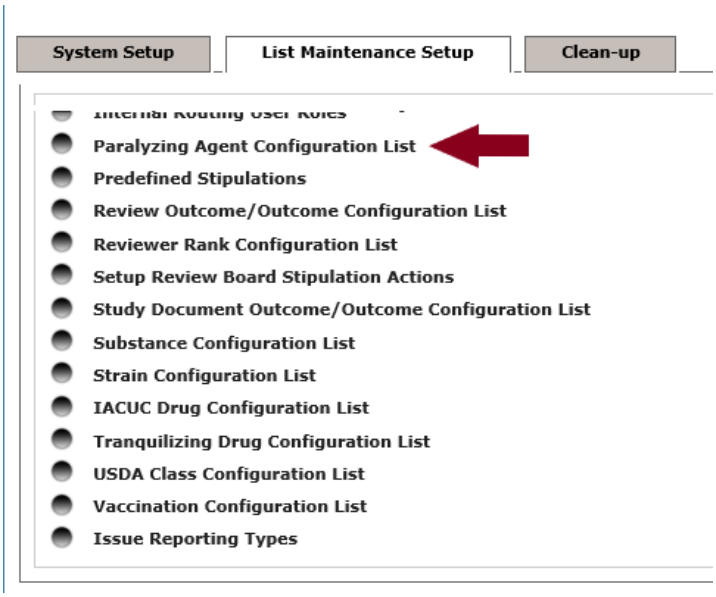


The record is revised on the **Setup Paralyzing List** page.

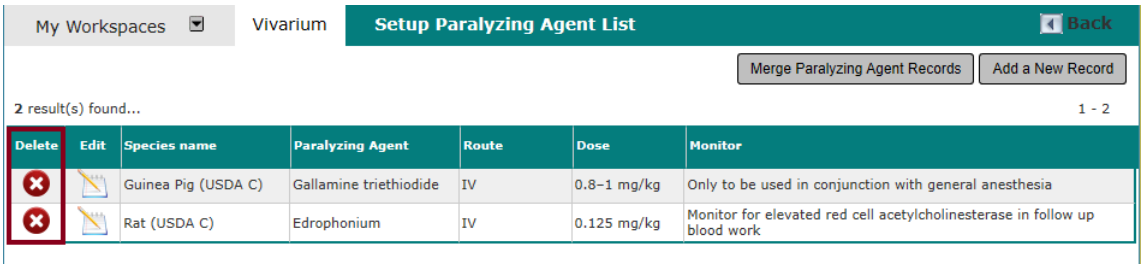


Delete Paralyzing Agent

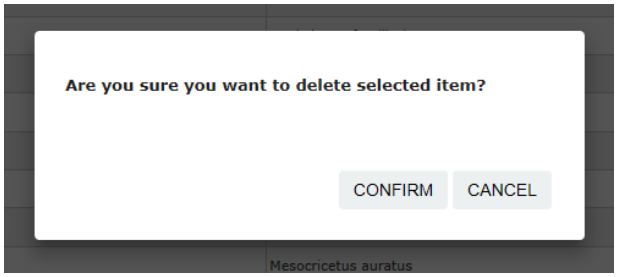
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Paralyzing Agent Configuration List** link.



The **Setup Paralyzing Agent List** page is opened. Click the icon in the **Delete** column for the applicable record.



A confirmation popup window displays.

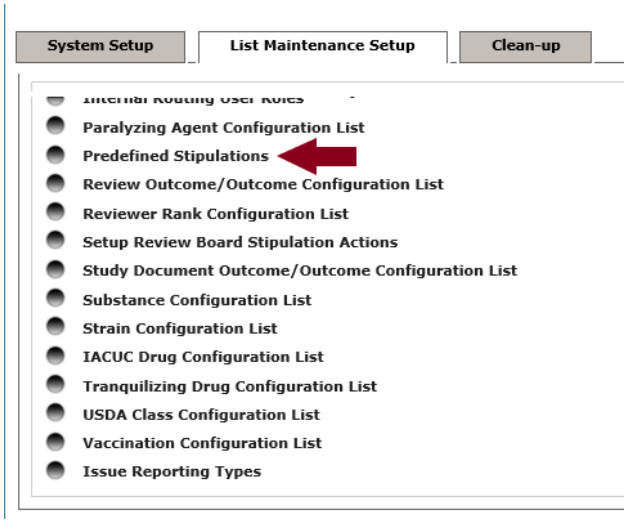


Click **CANCEL** to close the popup without deleting the record and return to the **Setup Paralyzing Agent List** page.

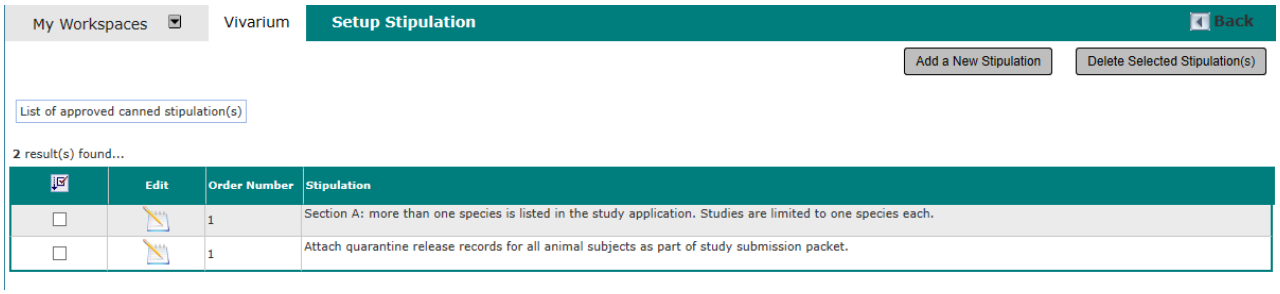
Click **CONFIRM** to complete deletion of the record and return to the **Setup Paralyzing Agent List** page.

Predefined Stipulations

The Predefined Stipulations List is where a list of boilerplate stipulations approved by the institution for use in studies is maintained in the iRIS™ system. To view the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Predefined Stipulations** link.



The **Setup Stipulation** page is opened.



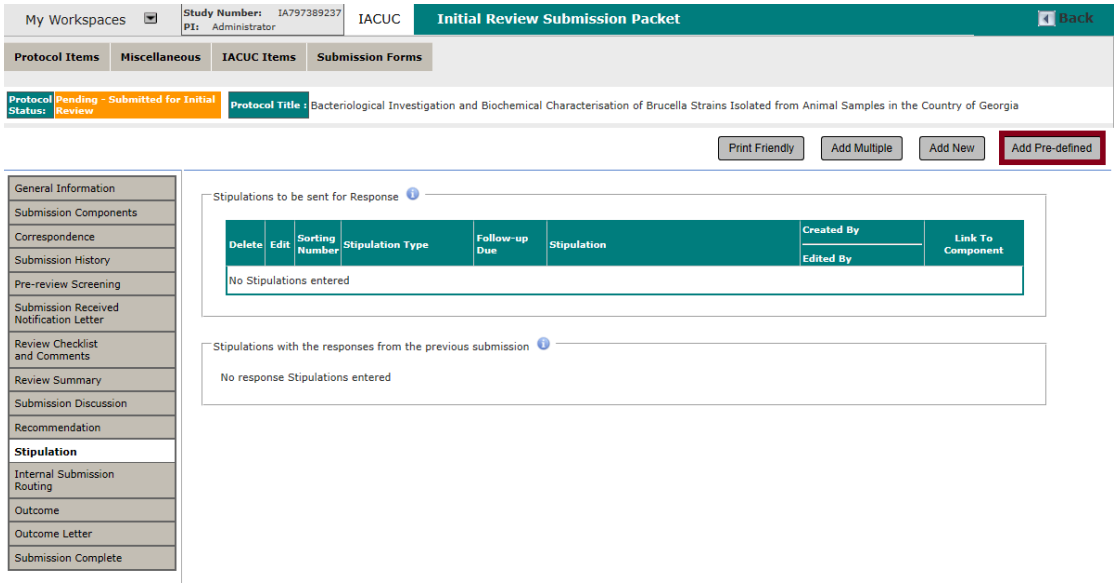
Predefined Stipulation List Implementation – Application Side

Stipulations are generally assigned and tracked by the applicable review board, making this functionality inapplicable on the application side.

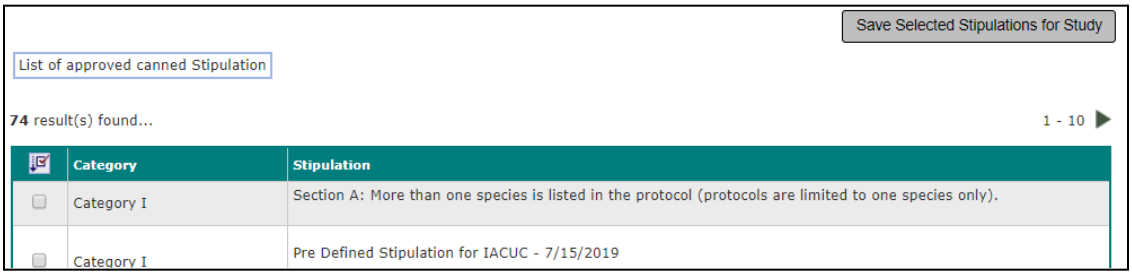
Predefined Stipulation List Implementation – Board Side

The predefined stipulation list is employed in the following areas on the review board / system setup side of iRIS™.

IACUC / ARC Study Application — the Predefined Stipulation List is employed on the **Stipulation** tab of the **Initial Review Submission Packet**, which is accessed via IACUC / ARC > Submissions > [submission opened for editing]



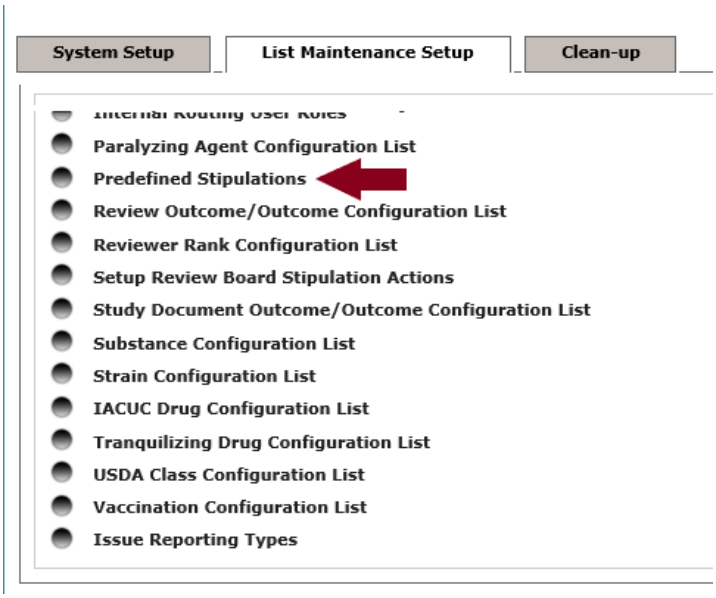
Click the **Add Pre-defined** button to open the predefined stipulations list.



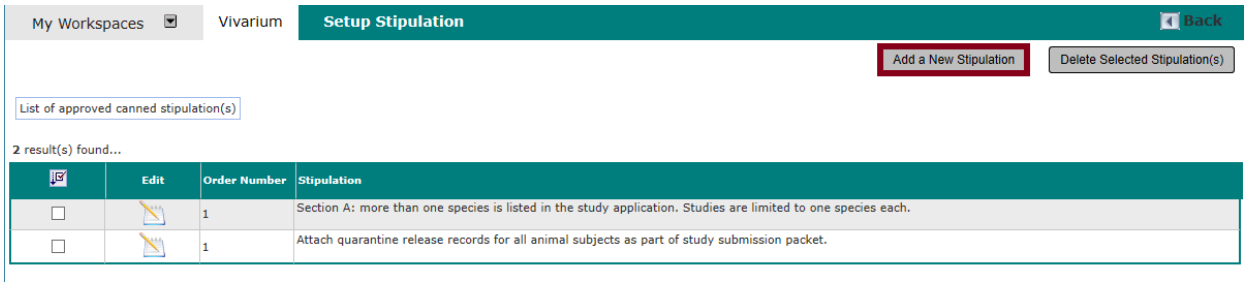
For more information about IACUC study application processing, see the IACUC Assistant manual.

Add Predefined Stipulation

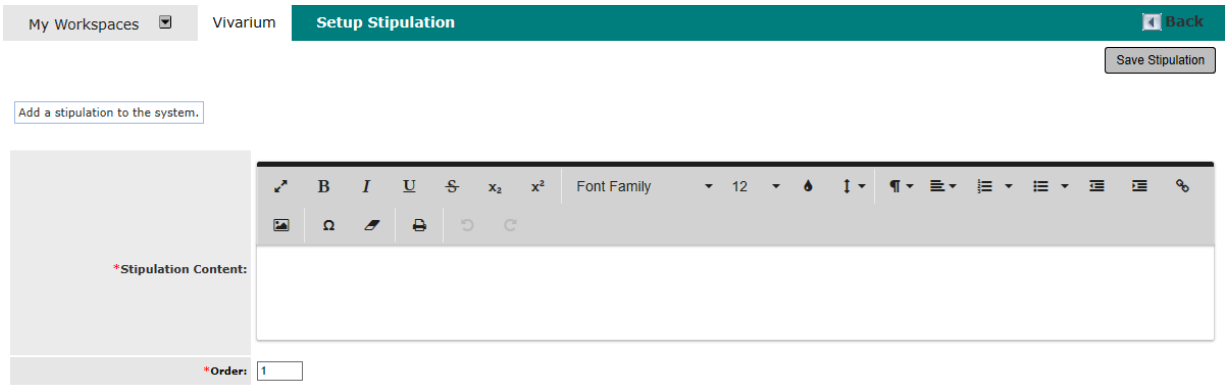
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Predefined Stipulations** link.



The **Setup Stipulation** page is opened. Click the **Add a New Stipulation** button.

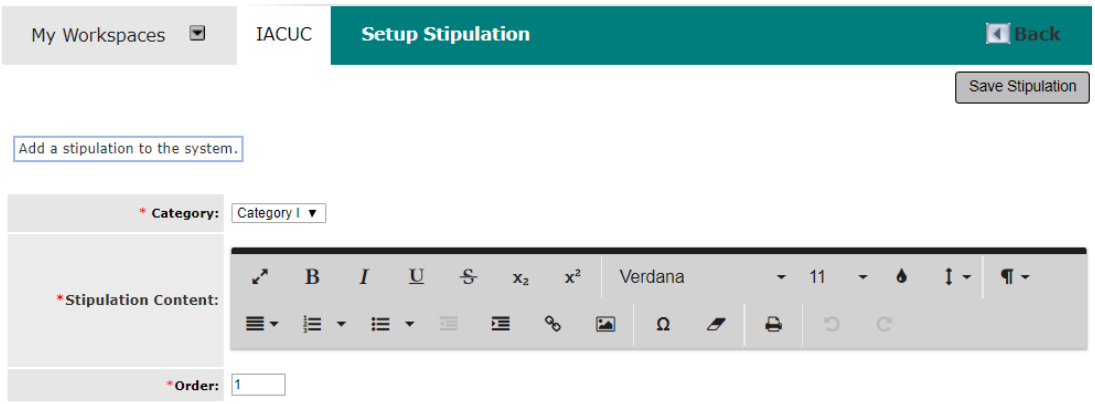


The **Add a stipulation to the system** panel is opened.

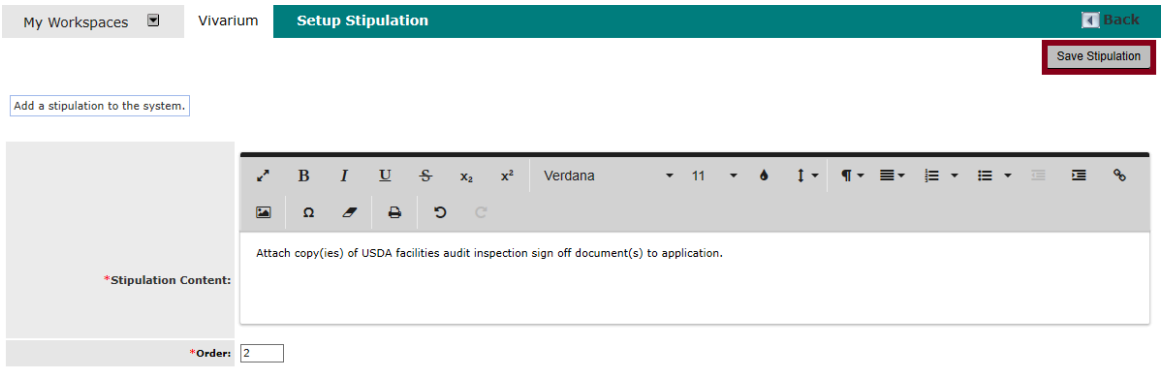


Enter desired stipulation text in the **Stipulation Content** area. Use the toolbar buttons to format the text, insert links or insert images. Enter a numeric **Order** value to indicate routing priority order for the stipulation.

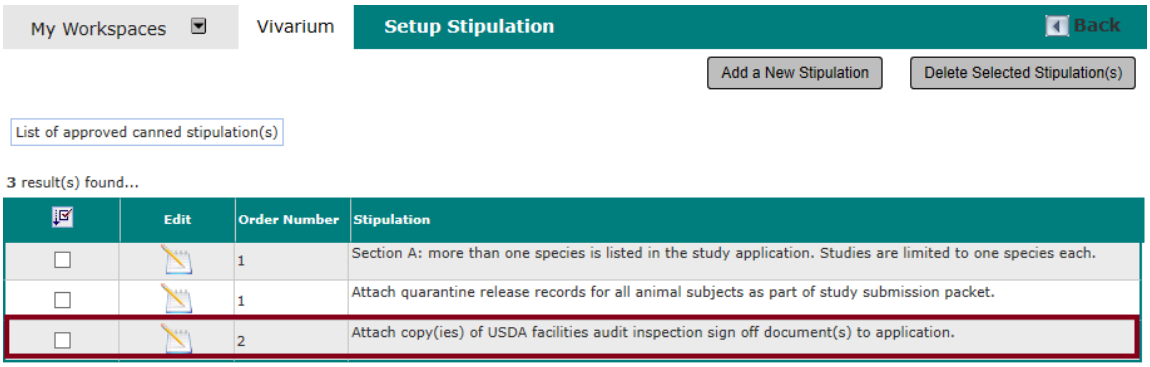
If stipulation categories are in use at the institution (property rb.use_stipulation_category set to "Yes" under Animal Resource Center > Review Board Administration > Board Configuration Options > Recommendations and Stipulations)a **Category** field is also included at the top of the page, as shown below. Select the applicable **Category** from the dropdown list.



In the example below, the add panel is complete. Click the **Save Stipulation** button to save the new record and close the add panel.

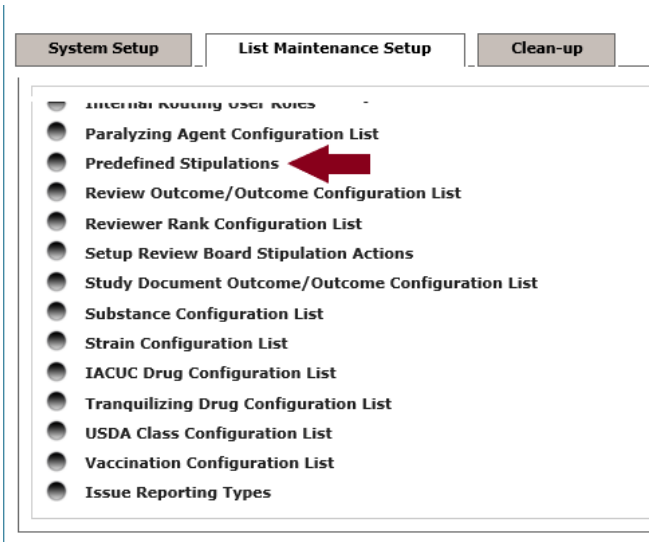


The new stipulation is added on the main **Setup Stipulation** list page.

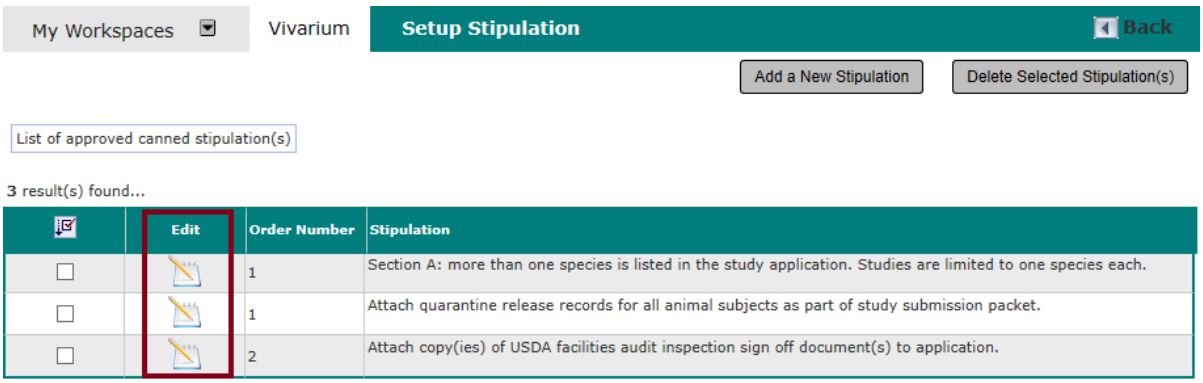


Edit Predefined Stipulation

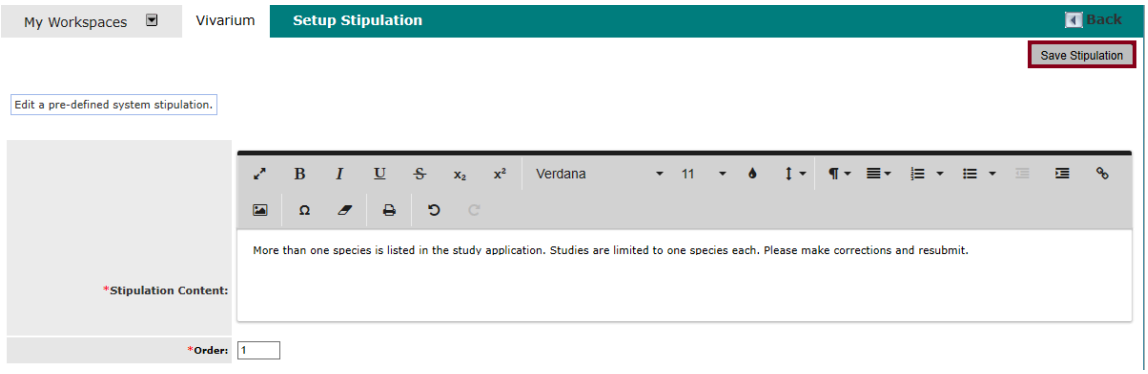
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Predefined Stipulations** link.



The **Setup Stipulation** page is opened. Click the icon in the **Edit** column for the applicable record.

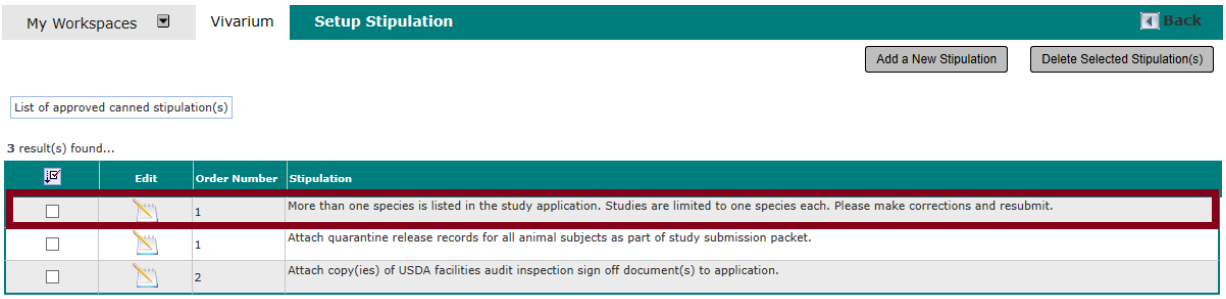


The selected record is opened in an **Edit a pre-defined system stipulation** panel.



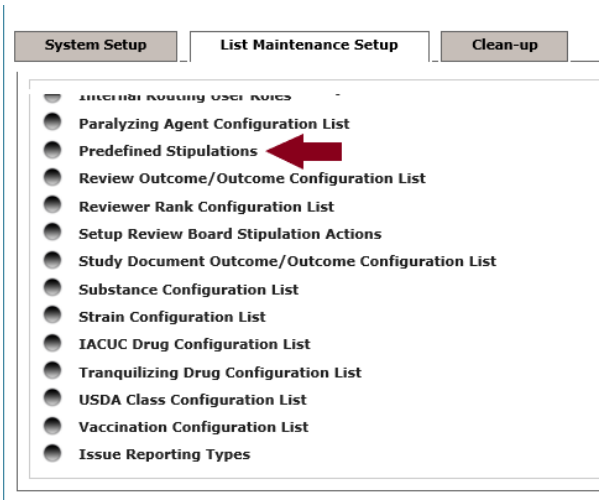
*Note that if stipulation categories are in use at the institution (property rb.use_stipulation_category set to "Yes" under IACUC Assistant > Review Board Administration > Board Configuration Options > Recommendations and Stipulations) a **Category** field is included in the edit panel.*

Make desired changes and click the **Save Stipulation** button to save changes and close the edit panel. The record is updated on the **Setup Stipulation** list page.

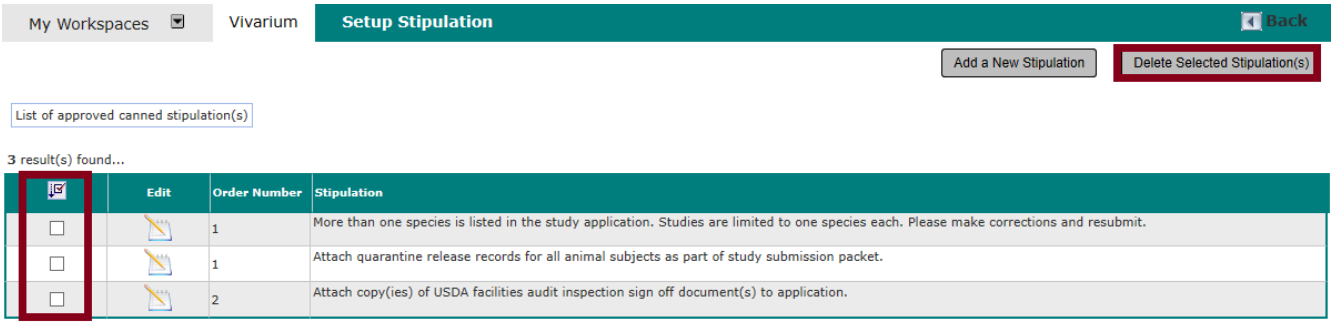


Delete Predefined Stipulation

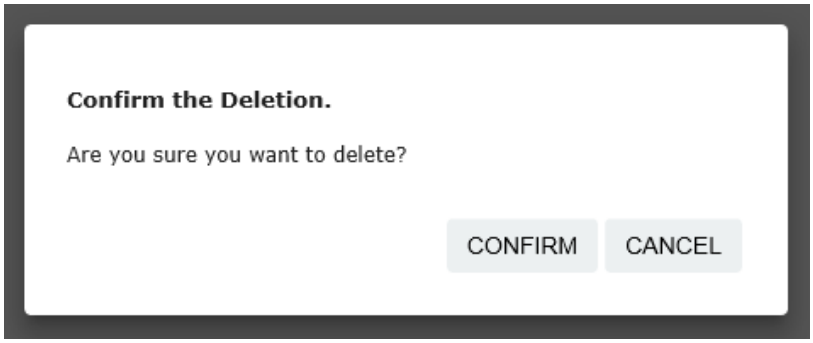
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Predefined Stipulations** link.



The **Setup Stipulation** page is opened. Select the checkbox(es) in the far-left column for the record(s) to be deleted and click the **Delete Selected Stipulation(s)** button.

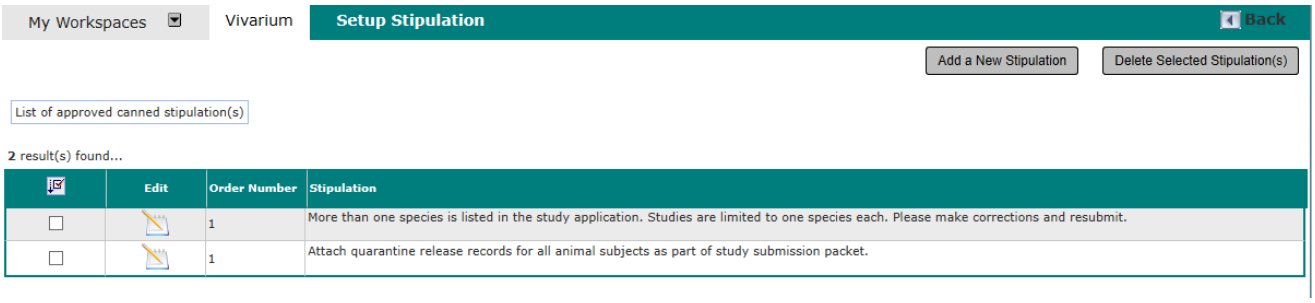


A confirmation popup window displays.



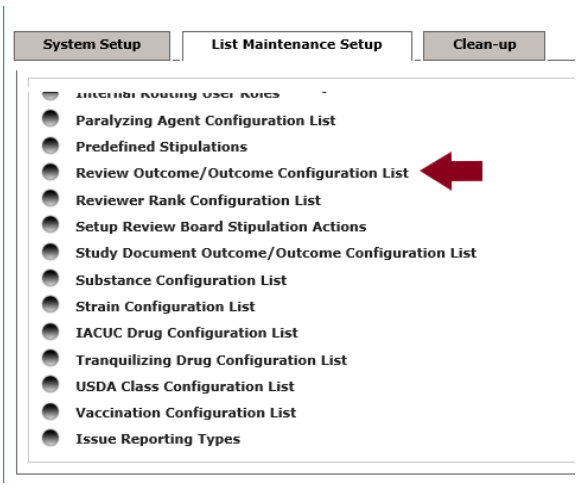
Click **CANCEL** to close the popup without deleting the record and return to the **Setup Stipulation** page.

Click **CONFIRM** to complete deletion of the record and return to the **Setup Stipulation** page. The record is deleted from the **Setup Stipulation** page.

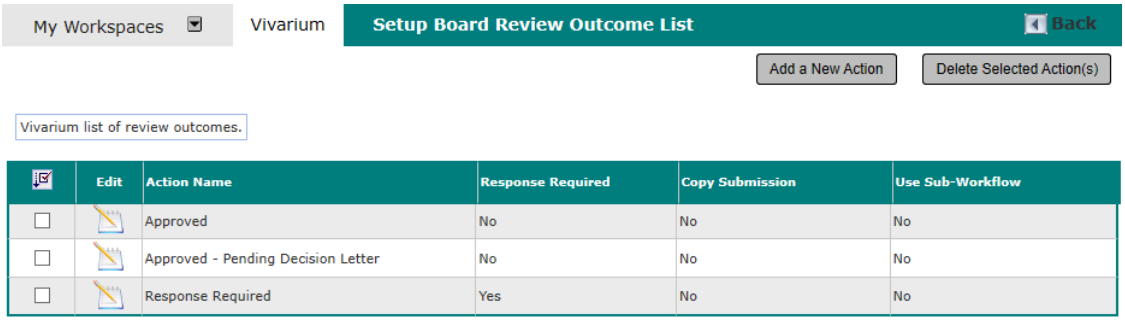


Review Outcome/Outcome Configuration List

The Review Outcome / Outcome Configuration List is where a list of predefined review outcomes is maintained in the iRIS™ system. To view the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Review Outcome / Outcome Configuration List** link.



The **Setup Board Review Outcome List** page is opened.



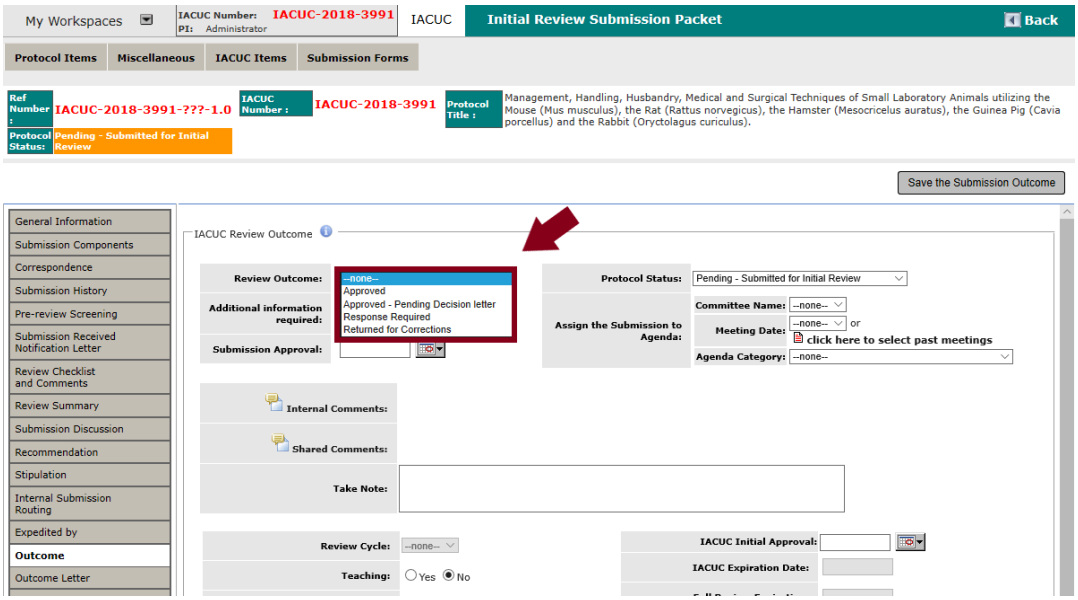
Review Outcome List Implementation – Application Side

Review outcomes are generally assigned by the applicable review board, making this functionality inapplicable on the application side.

Review Outcome List Implementation – Board Side

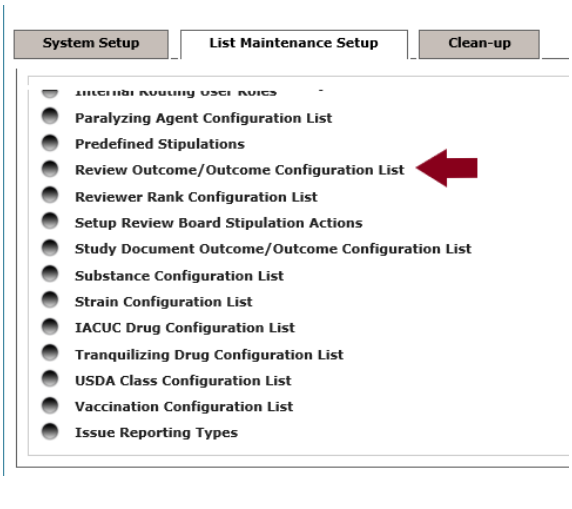
The review outcome list is employed in the following areas on the review board / system setup side of iRIS™.

IACUC / ARC Submission — the **Review Outcome** dropdown list is employed in the Outcome tab within submission processing screens

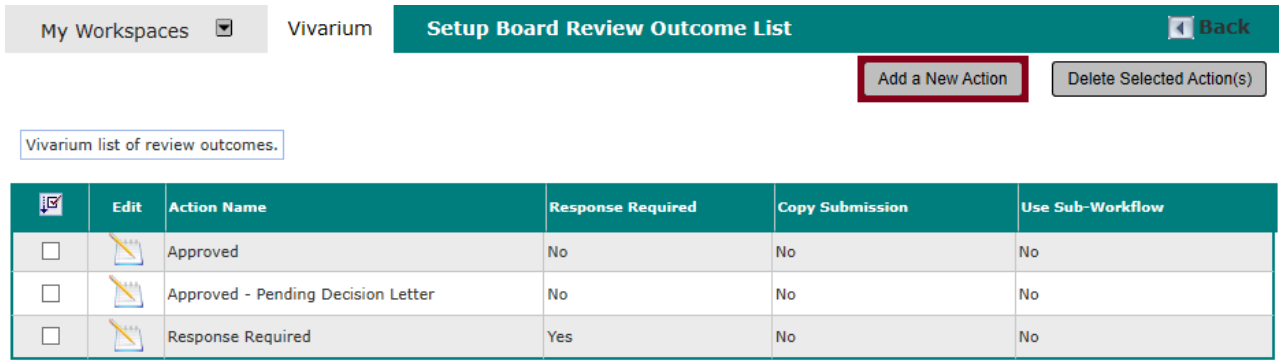


Add Review Outcome

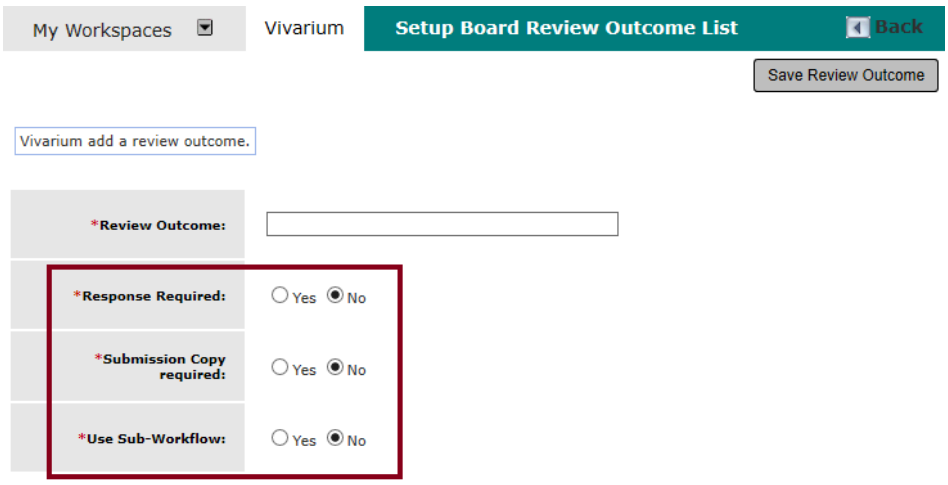
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Review Outcome / Outcome Configuration List** link.



The **Setup Board Review Outcome List** page is opened. Click the **Add a New Action** button.



The **add a review outcome** panel is opened. Note the default selections of "No" for **Response Required**, **Submission Copy required** and **Use Sub-Workflow**.

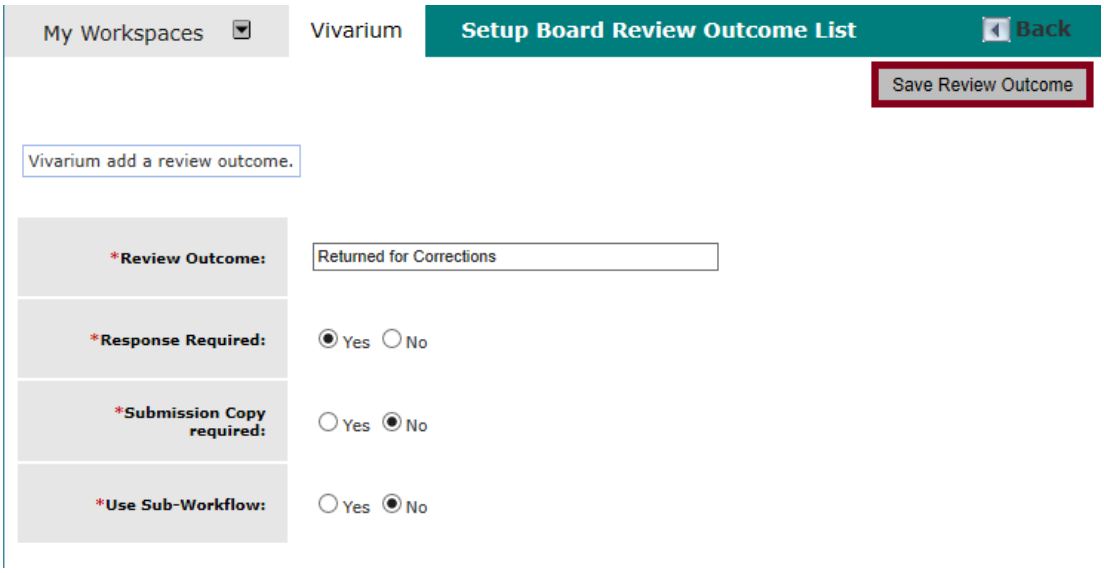


A selection of "Yes" for **Response Required** means that where this outcome is assigned, an application / submission will be returned and held from further progress until the required response is received.

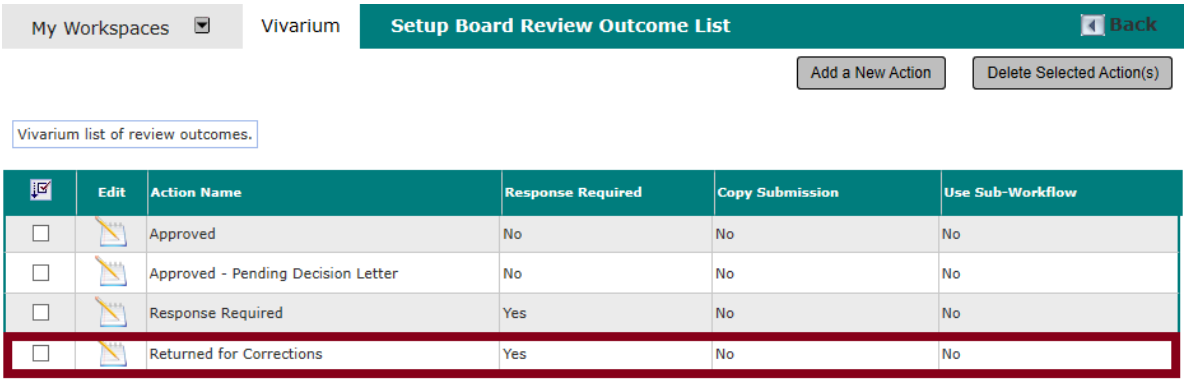
A selection of "Yes" for **Submission Copy Required** means that where this outcome is assigned, a copy of the submission will be added to the Not Assigned queue. This option is typically used for tabled submissions that are to be assigned to a future meeting.

A selection of "Yes" for **Use Sub-Workflow** means that where this outcome is assigned, the system will trigger a sub-workflow that must be completed before submission for final approval.

Enter a **Review Outcome** and click to select "Yes" or "No" for **Response Required**, **Submission Copy required** and **Use Sub-Workflow**, then click the **Save Review Outcome** button.

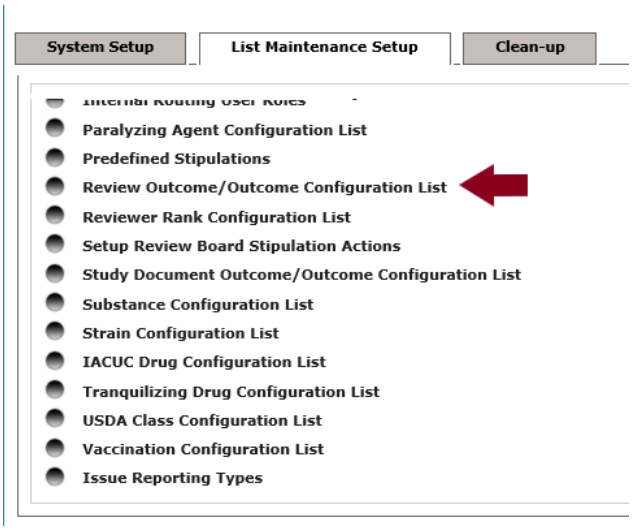


The record is added on the main **Setup Board Review Outcome List** page.

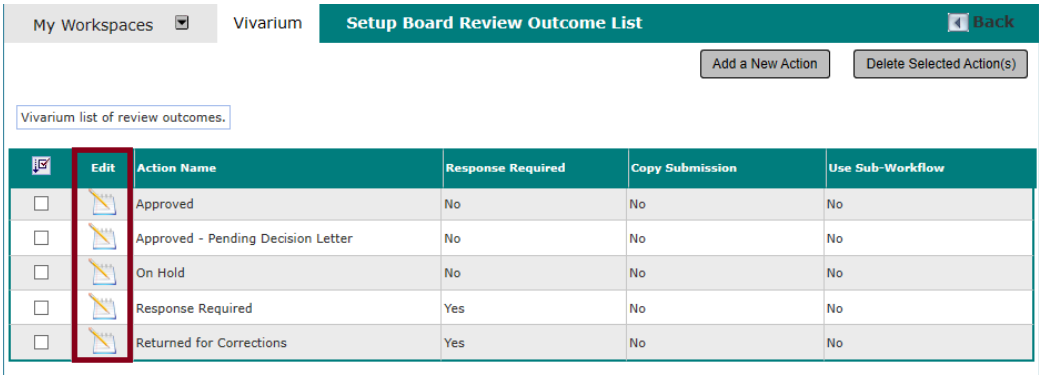


Edit Review Outcome

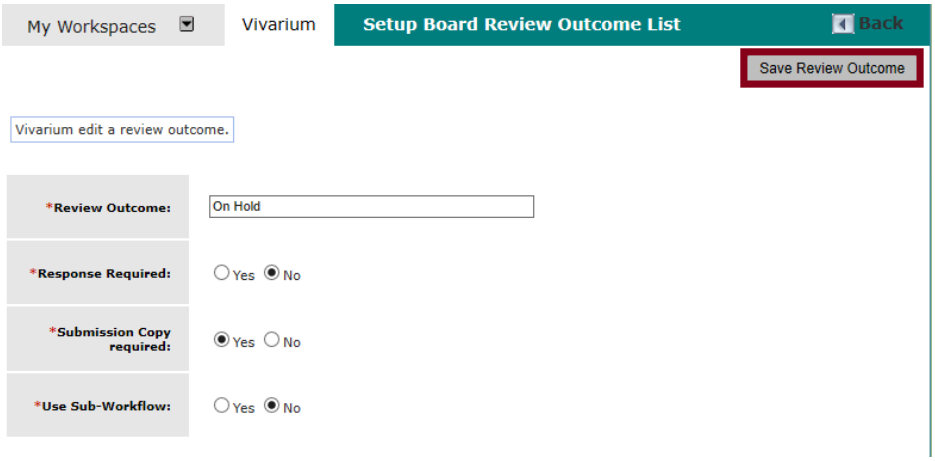
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Review Outcome / Outcome Configuration List** link.



The **Setup Board Review Outcome List** page is opened. Click the icon in the **Edit** column for the applicable record.



The record is opened in an **edit a review outcome** panel.



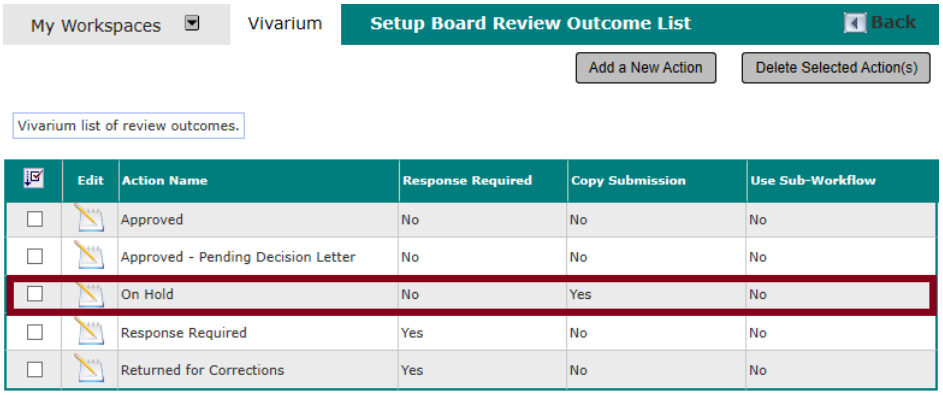
A selection of "Yes" for **Response Required** means that where this outcome is assigned, an application / submission will be returned and held from further progress until the required response is received.

A selection of "Yes" for **Submission Copy Required** means that where this outcome is assigned, a copy of the submission will be added to the Not Assigned queue. This option is typically used for tabled submissions that are to be assigned to a future meeting.

A selection of "Yes" for **Use Sub-Workflow** means that where this outcome is assigned, the system will trigger a sub-workflow that must be completed before submission for final approval.

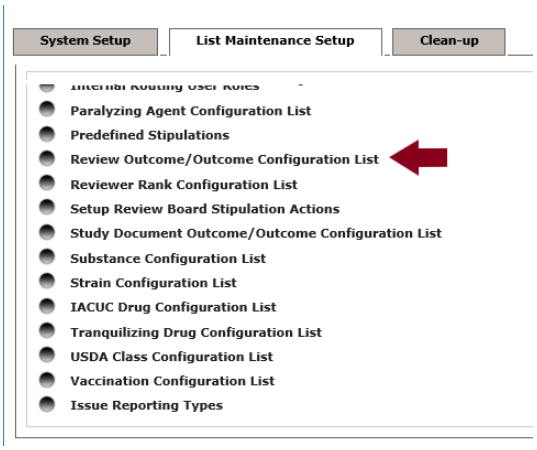
Make desired changes and click the **Save Review Outcome** button.

The edit panel is closed and the record is updated on the **Setup Board Review Outcome List** page.

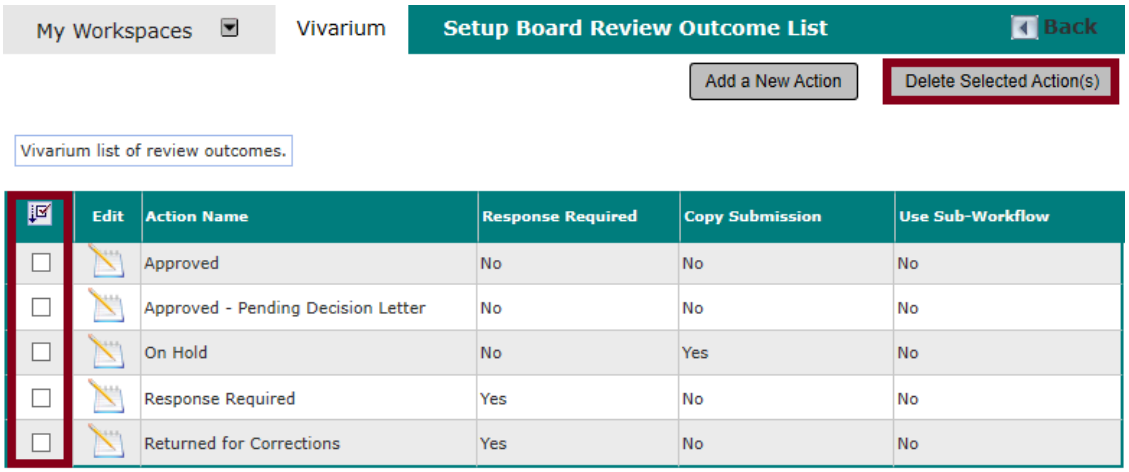


Delete Review Outcome

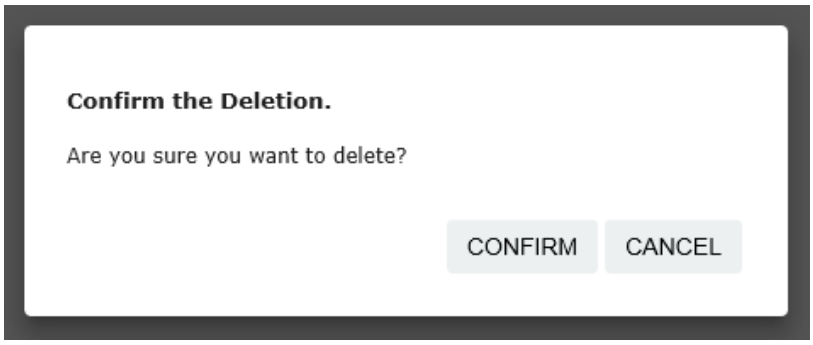
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Review Outcome / Outcome Configuration List** link.



The **Setup Board Review Outcome List** page is opened. Select the checkbox(es) in the far-left column for the record(s) to be deleted, then click the **Delete Selected Action(s)** button.



A confirmation popup window displays.

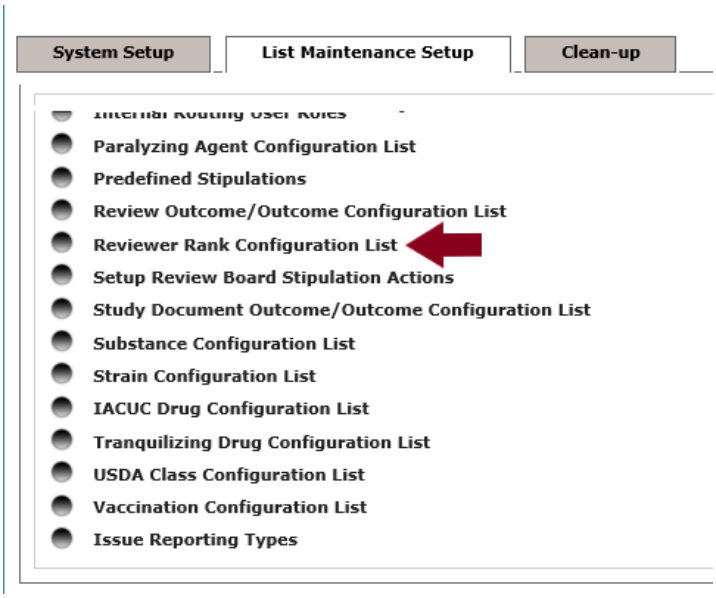


Click **CANCEL** to close the popup without deleting the record and return to the **Setup Board Review Outcome List** page.

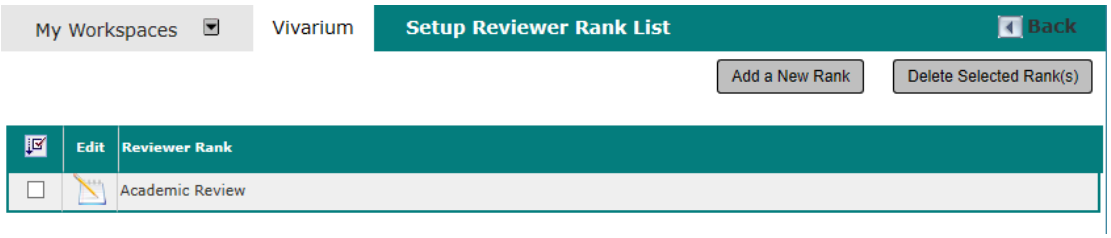
Click **CONFIRM** to complete deletion of the record and return to the **Setup Board Review Outcome List** page. The record is deleted from the **Setup Board Review Outcome List** page.

Reviewer Rank Configuration List

The Reviewer Rank Configuration List is where a list of predefined reviewer ranks is maintained in the iRIS™ system. To view the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Reviewer Rank Configuration List** link.



The **Setup Reviewer Rank List** page is opened.



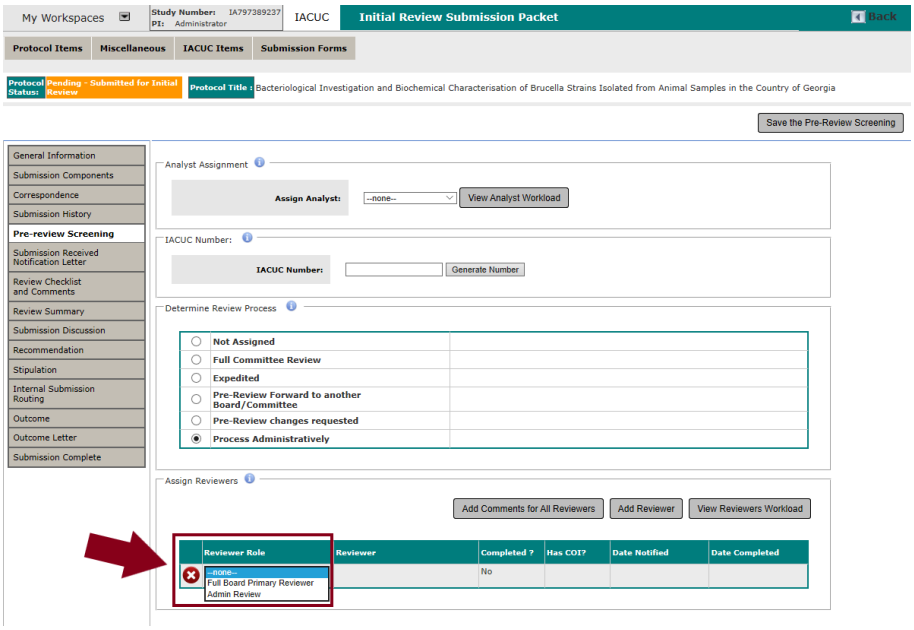
Reviewer Rank List Implementation – Application Side

Reviewer ranks are generally assigned and tracked by the Coordinator and/or applicable review board, making this functionality inapplicable on the application side.

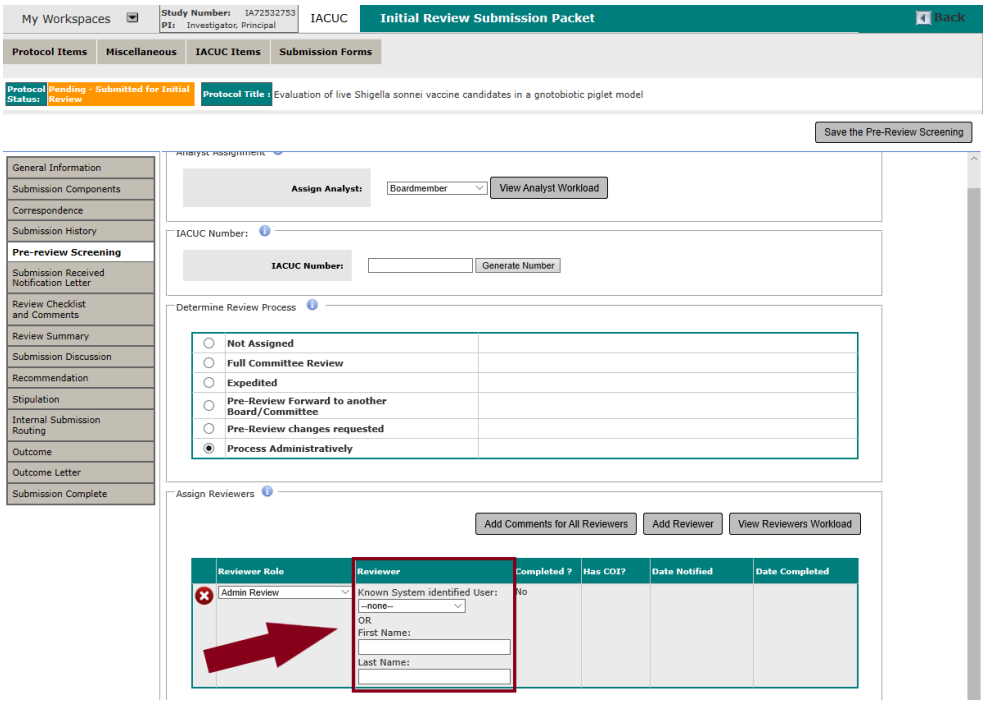
Reviewer Rank List Implementation – Board Side

The reviewer rank list is employed in the following areas on the review board / system setup side of iRIS™.

IACUC / ARC Application — the Reviewer Rank List is employed on the **Pre-review Screening** tab of the **Initial Review Submission Packet**, which is accessed via IACUC / ARC > Submissions > [submission opened for editing]

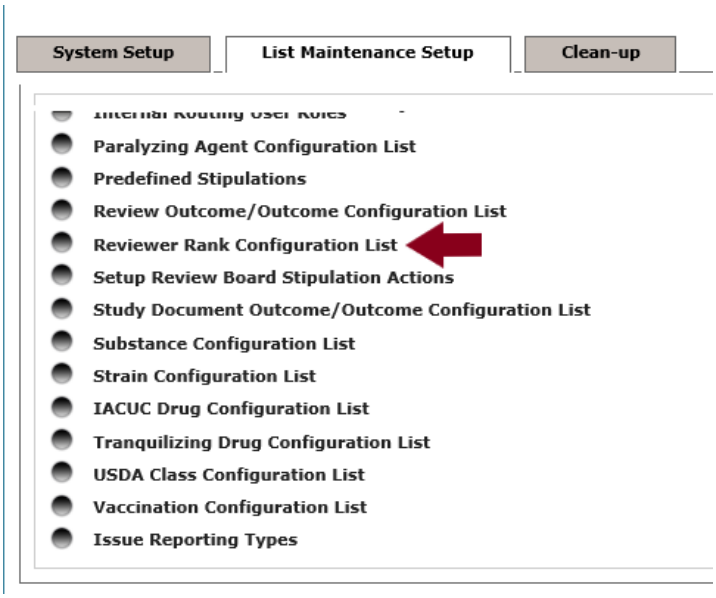


If the reviewer rank selected in the **Reviewer Role** column is an Ad Hoc rank, additional fields populate in the **Reviewer** column for entry of the reviewer name.

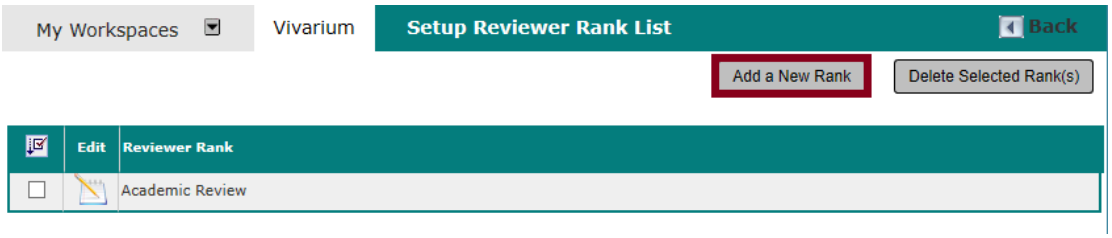


Add Reviewer Rank

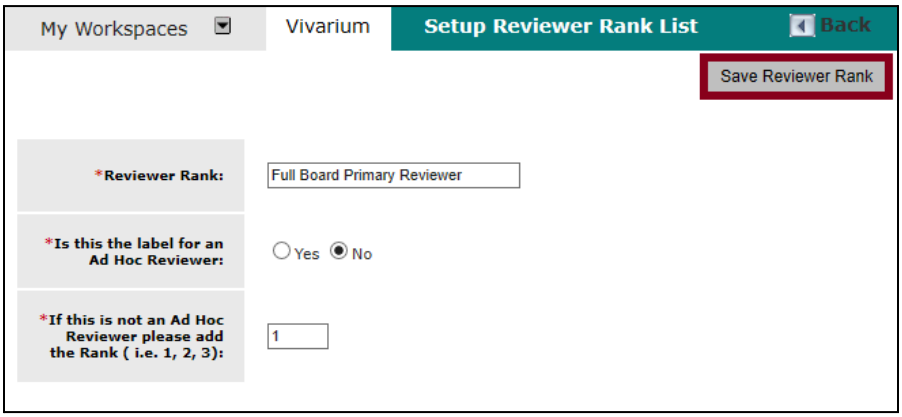
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Reviewer Rank Configuration List** link.



The **Setup Reviewer Rank List** page is opened. Click the **Add a New Rank** button.



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



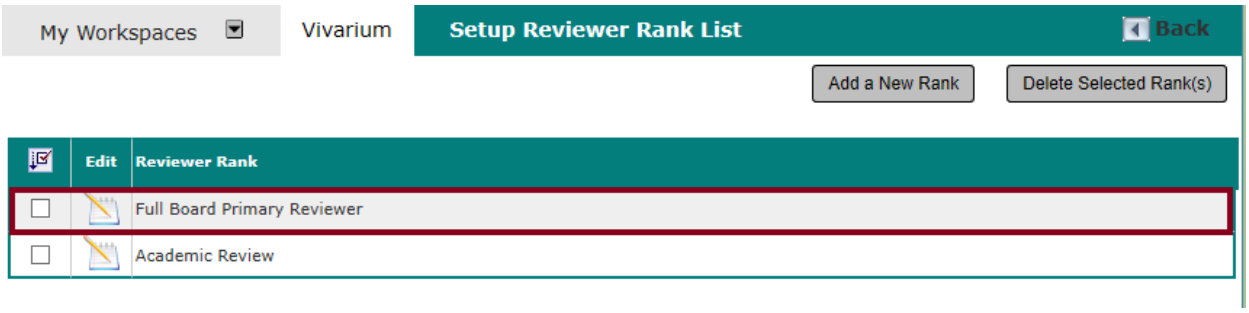
Enter a **Reviewer Rank**.

Click to select “Yes” or “No” for **Is this the label for an Ad Hoc reviewer**. Note that the field defaults to “Yes”.

In the **If this is not an Ad Hoc Review please add the Rank (e.g., 1, 2, 3)** field, enter a single digit from zero (0) through three (3). “0” indicates an Ad Hoc reviewer. “1” indicates a Primary Reviewer. “2” indicates a Secondary Reviewer. “3” indicates any other review level. “0” indicates Ad Hoc.

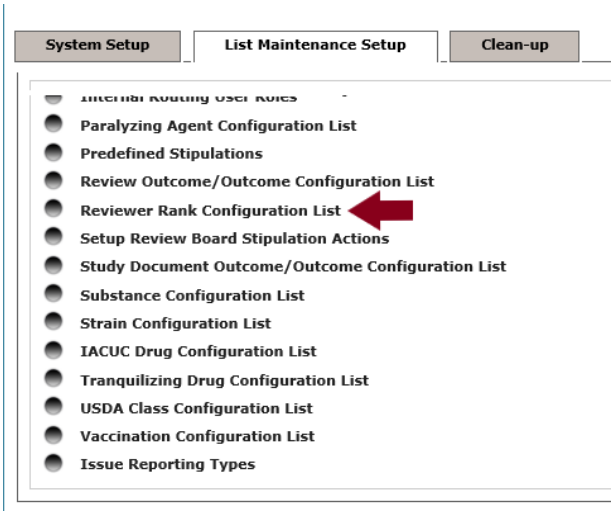
*Note that if no entry is made in the **If this is not an Ad Hoc Review please add the Rank (e.g., 1, 2, 3)** field a default value of “0” will be stored by the system, indicating this is an Ad Hoc Reviewer role.*

Click the **Save Reviewer Rank** button to close the add panel. The record is added on the **Setup Reviewer Rank List** page.

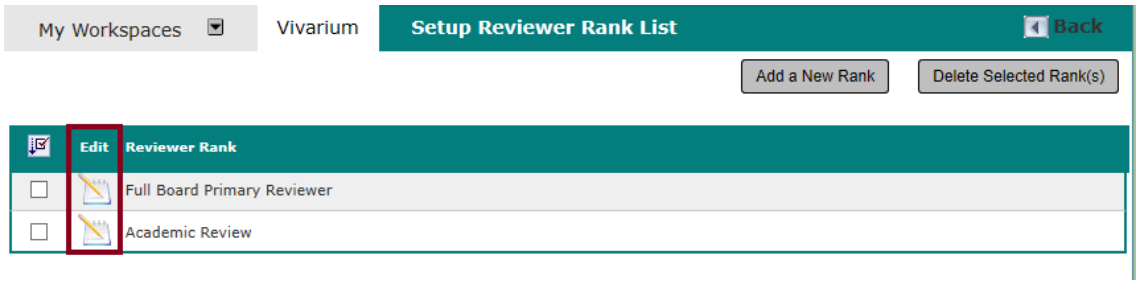


Edit Reviewer Rank

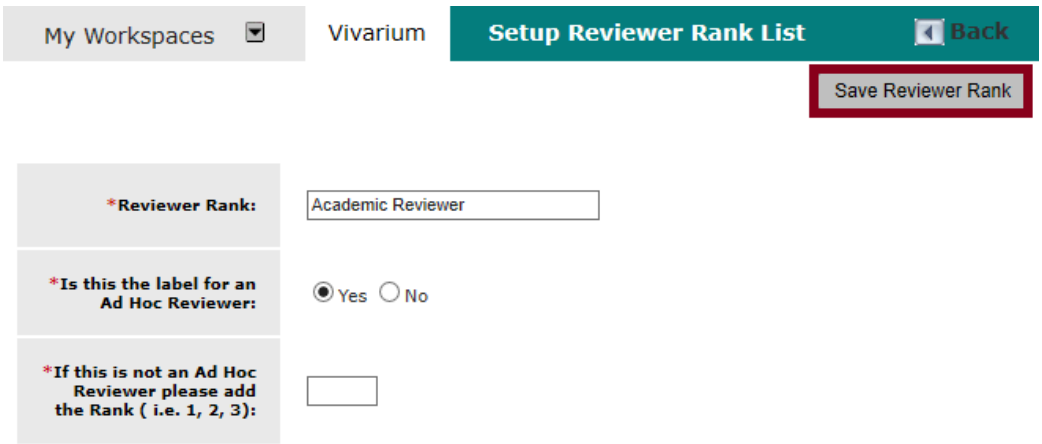
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Reviewer Rank Configuration List** link.



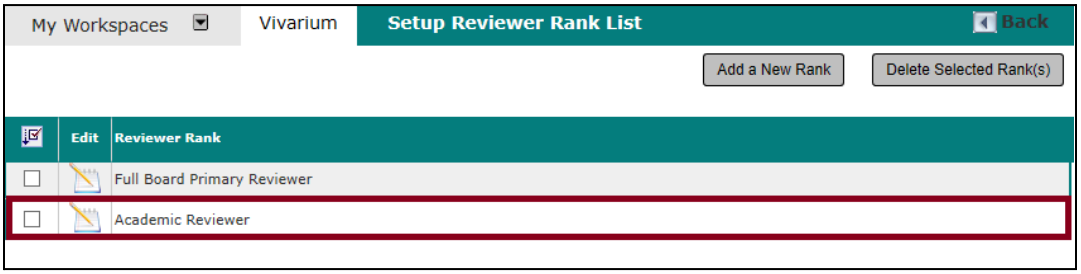
The **Setup Reviewer Rank List** page is opened. Click the icon in the **Edit** column for the applicable record.



The record is opened in an edit panel. Make desired changes and click the **Save Reviewer Rank** button.

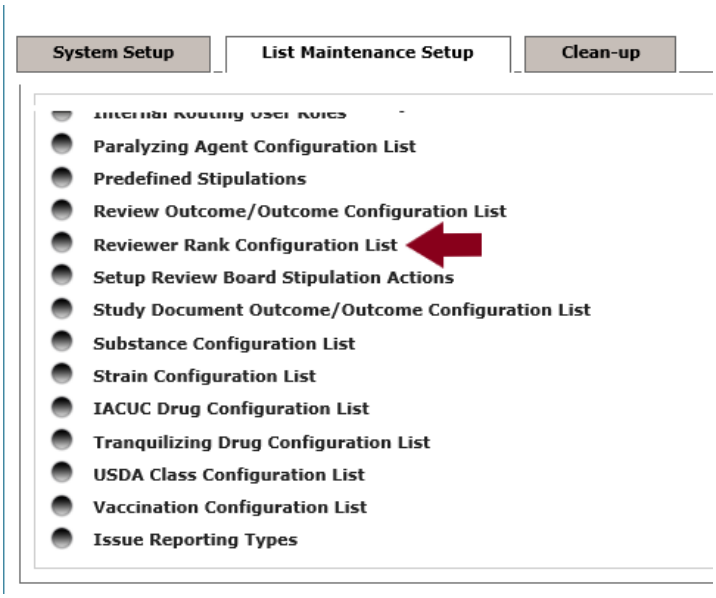


The edit panel is closed and the record is revised on the **Setup Reviewer Rank List** page.



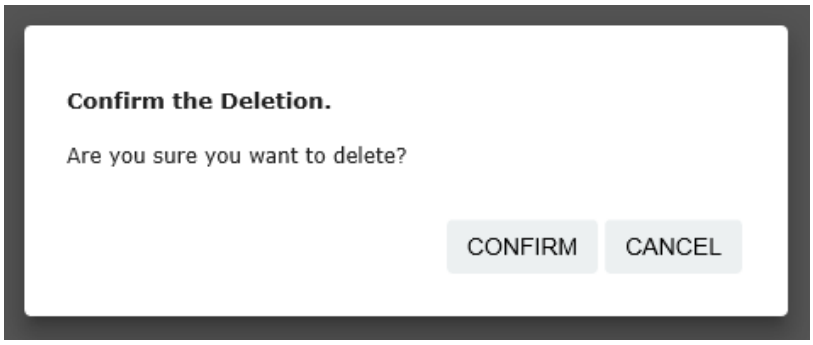
Delete Reviewer Rank

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Reviewer Rank Configuration List** link.



The **Setup Reviewer Rank List** page is opened. Select the checkbox(es) in the far-left column for the record(s) to be deleted and click the **Delete Selected Rank(s)** button.

A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record and return to the **Setup Reviewer Rank List** page.

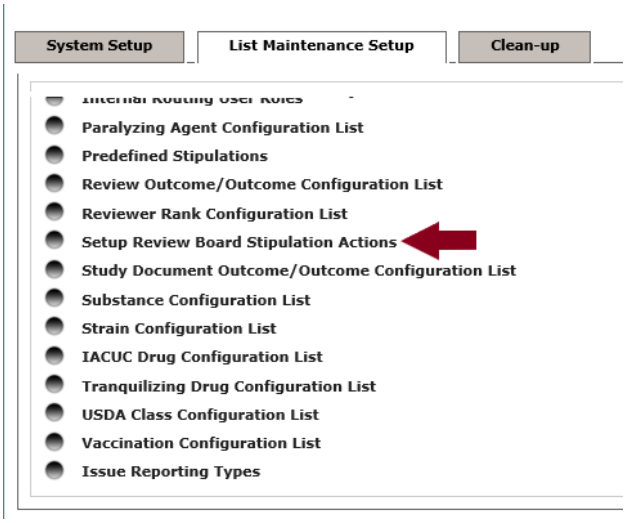
Click **CONFIRM** to complete deletion of the record and return to the **Setup Reviewer Rank List** page. The record is deleted from the **Setup Reviewer Rank List** page.

Setup Review Board Stipulation Actions

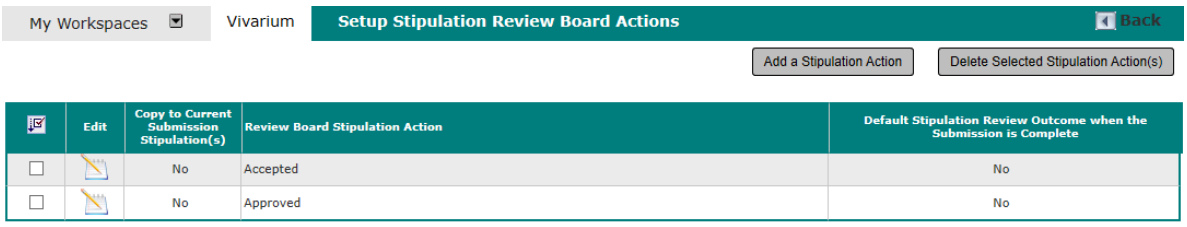
The Review Board Stipulation Actions List is where a list of boilerplate review board stipulation actions approved for use in studies is maintained in the iRIS™ system.

These actions are applied to stipulations when a study submits its response to the review board. Review board stipulation actions determine if the incoming stipulation can be closed as complete or must be retained as an outstanding item to the study.

To view the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Setup Review Board Stipulation Actions** link.

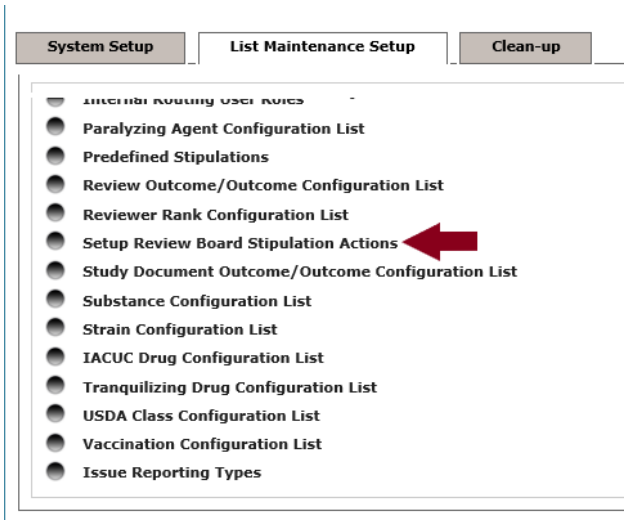


The **Setup Stipulation Review Board Actions** page is opened.

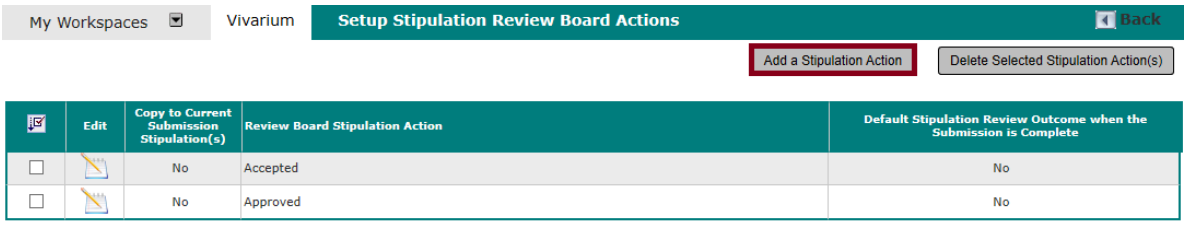


Add Review Board Stipulation

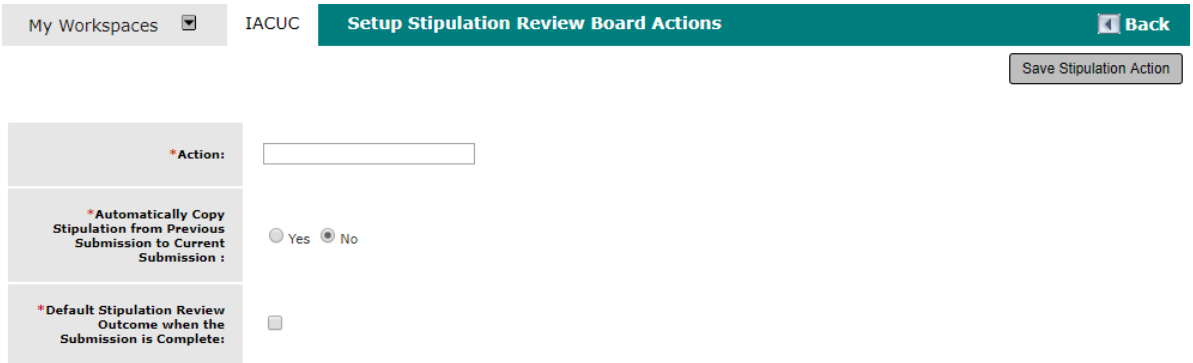
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Setup Review Board Stipulation Actions** link.



The **Setup Stipulation Review Board Actions** page is opened. Click the **Add a Stipulation Action** button.



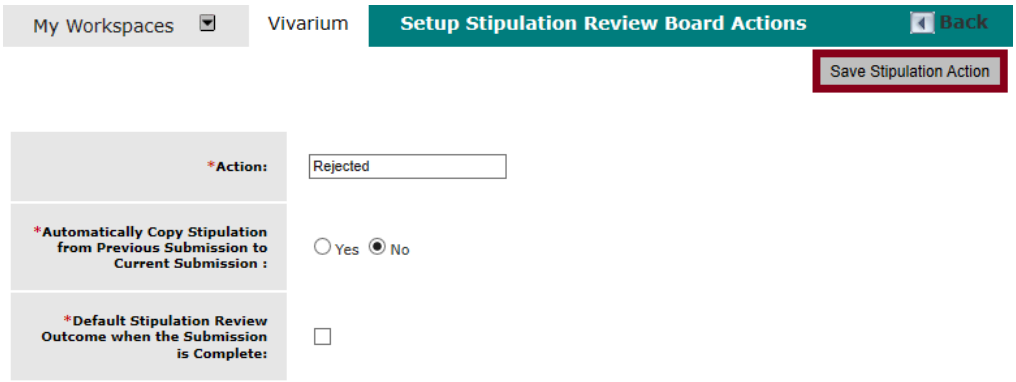
An add panel is opened for creation of the new record.



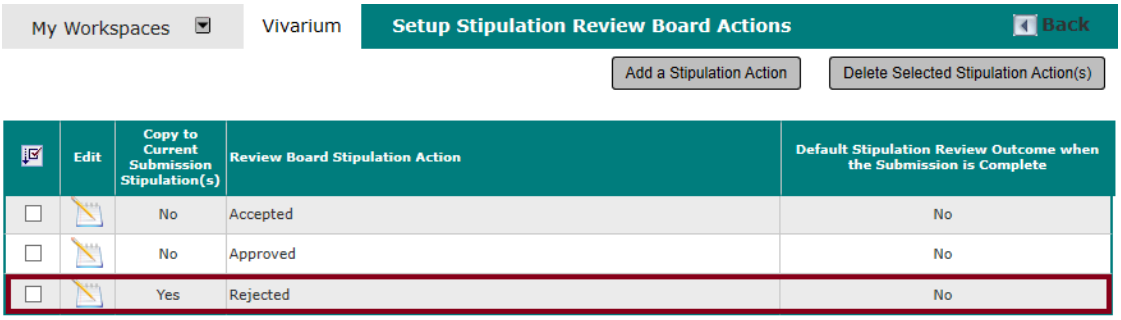
The **Automatically Copy Stipulation from Previous Submission to Current Submission** setting controls whether the stipulation is to be closed as completed or copied to the current submission and remain as an outstanding item to the study. “No” indicates the stipulation is to be closed. “Yes” indicates the stipulation will remain as an outstanding item to the study.

The **Default Stipulation Review Outcome when the Submission is Complete** selection dictates whether a closed status is to be automatically assigned to the stipulation. Click the **Save Stipulation Action** button to add the record to the list.

Complete the form as desired and click the **Save Stipulation Action** button.

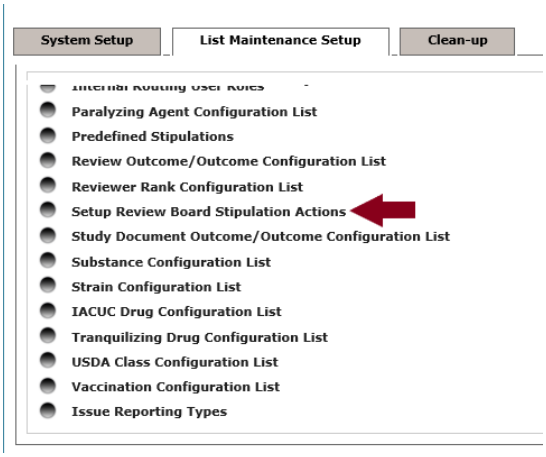


The record is added to the **Setup Stipulation Review Board Actions** list page.

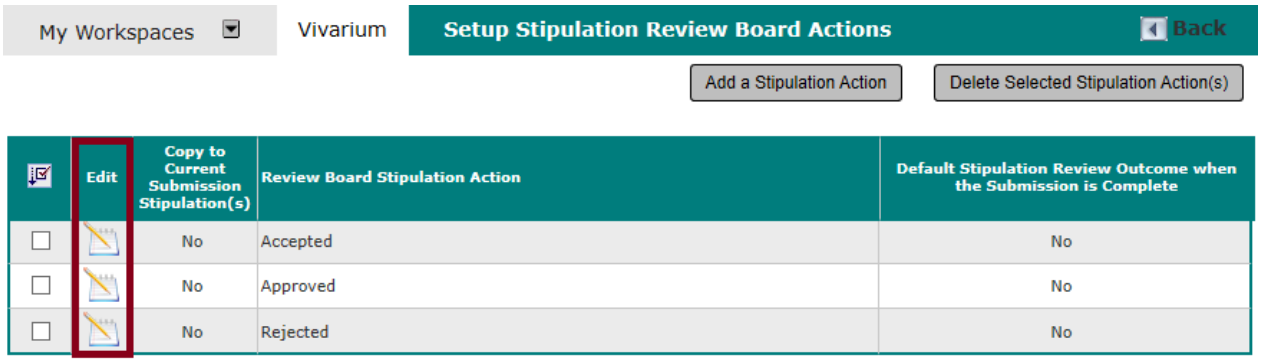


Edit Review Board Stipulation

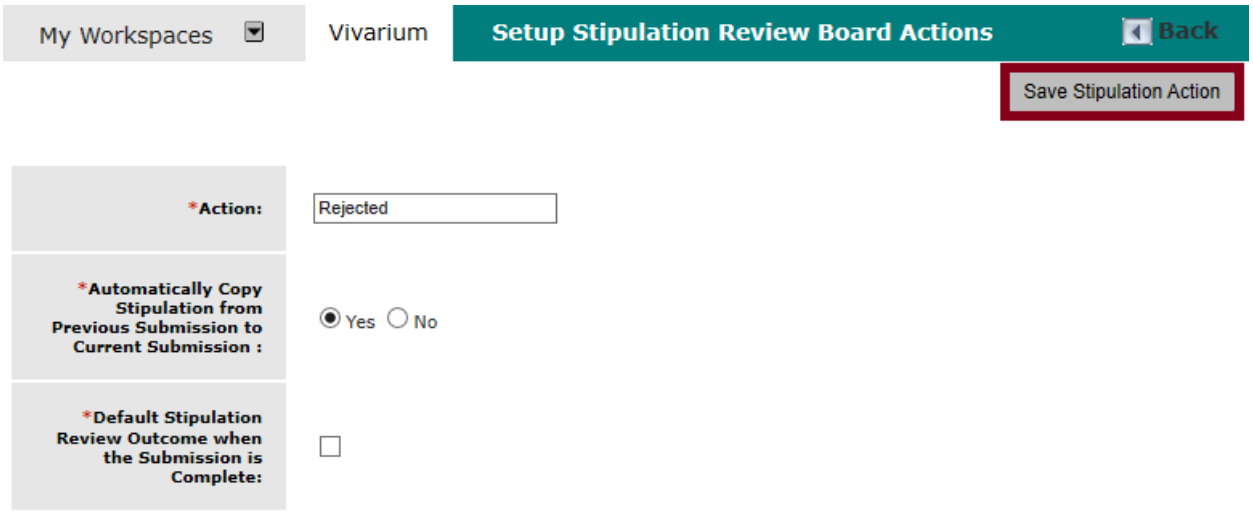
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Setup Review Board Stipulation Actions** link.



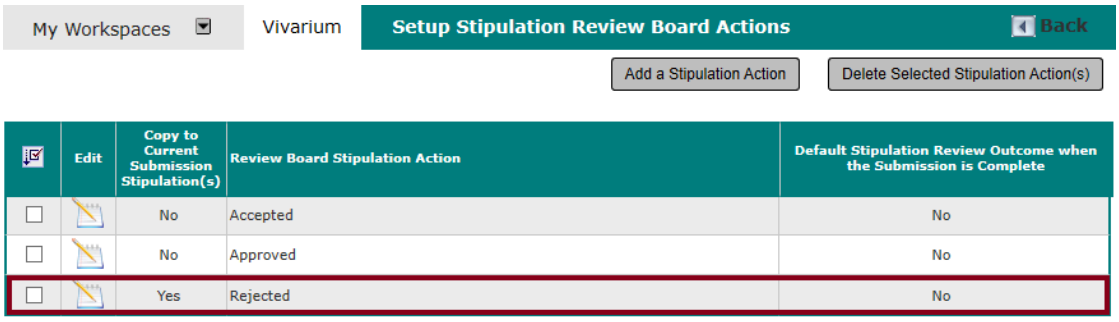
The **Setup Stipulation Review Board Actions** page is opened. Click the icon in the Edit column for the applicable record.



The record is opened in an edit panel. Make desired changes and click the **Save Stipulation Action** button.

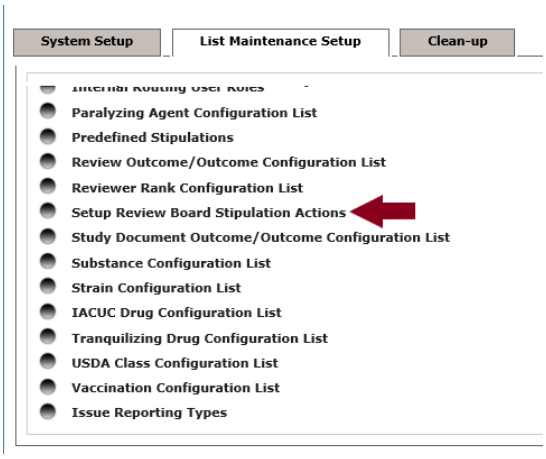


The edit panel is closed, and the record is revised on the **Setup Stipulation Review Board Actions** list page.

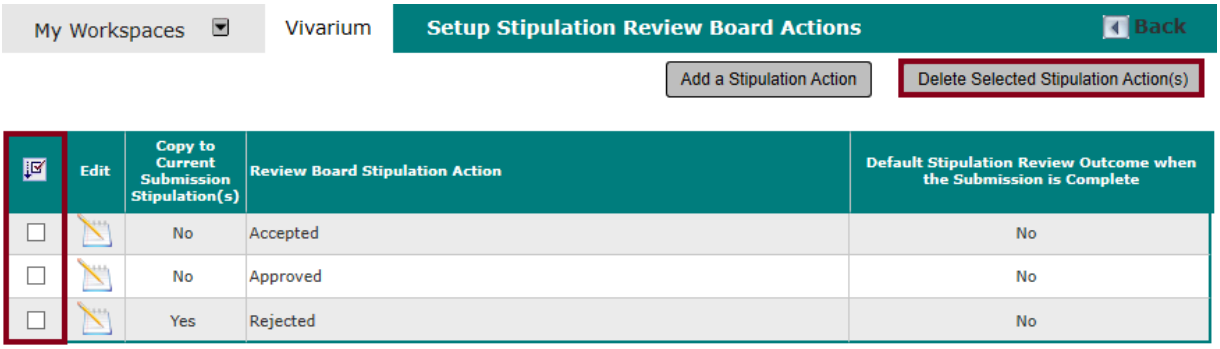


Delete Review Board Stipulation

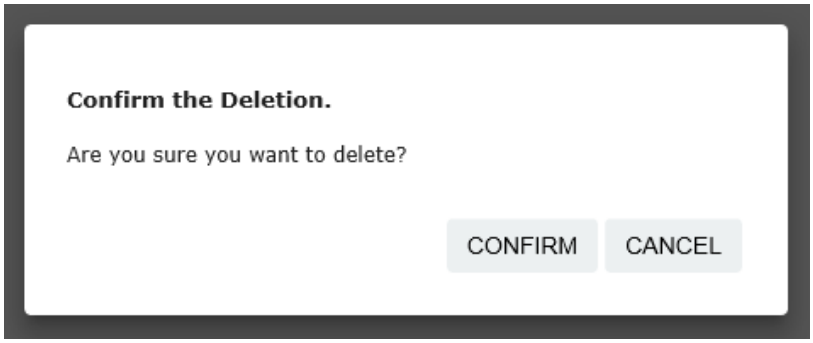
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Setup Review Board Stipulation Actions** link.



The **Setup Stipulation Review Board Actions** page is opened. Select the checkbox(es) in the far-left column for the record(s) to be deleted and click the **Delete Selected Stipulation Action(s)** button.



A confirmation popup window displays.

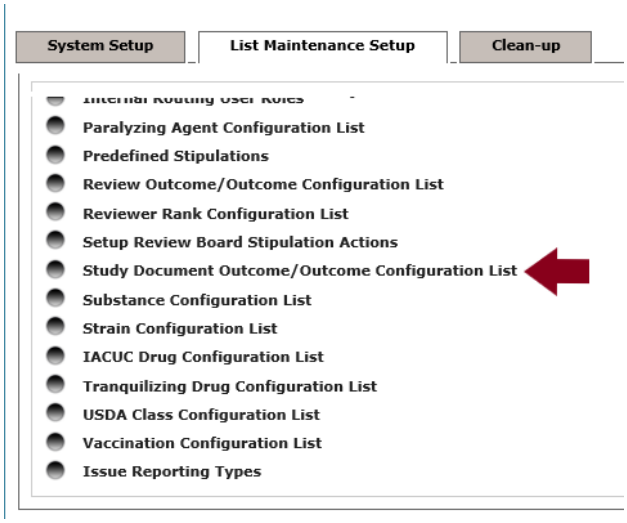


Click **CANCEL** to close the popup without deleting the record and return to the **Setup Stipulation Review Board Actions** page.

Click **CONFIRM** to complete deletion of the record and return to the **Setup Stipulation Review Board Actions** page. The record is deleted from the **Setup Stipulation Review Board Actions** page.

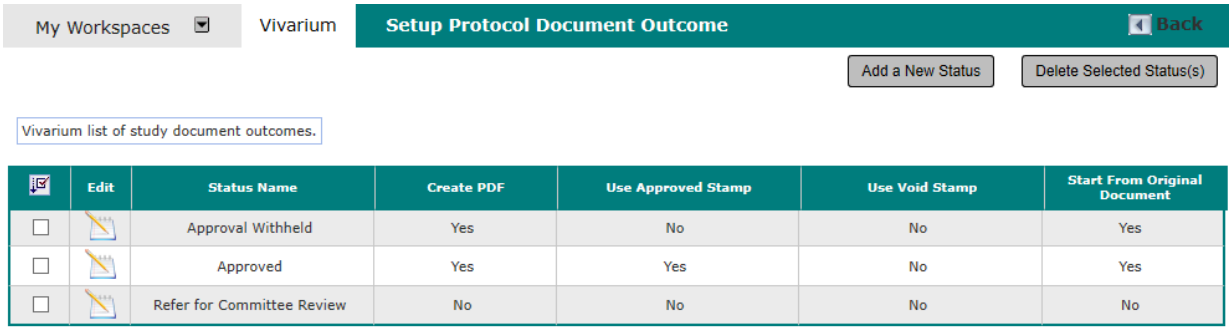
Study Document Outcome/Outcome Configuration List

The Document Outcome/Outcome Configuration List is where a list of boilerplate outcome statuses approved for use in studies is maintained in the iRIS™ system. To view the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Study Document Outcome / Outcome Configuration List** link.



The **Setup Protocol Document Outcome** page is opened.

Note that at some institutions, the term "Study" is substituted for "Protocol". These terms may be used interchangeably in manual text and screenshots.



	Edit	Status Name	Create PDF	Use Approved Stamp	Use Void Stamp	Start From Original Document
☐		Approval Withheld	Yes	No	No	Yes
☐		Approved	Yes	Yes	No	Yes
☐		Refer for Committee Review	No	No	No	No

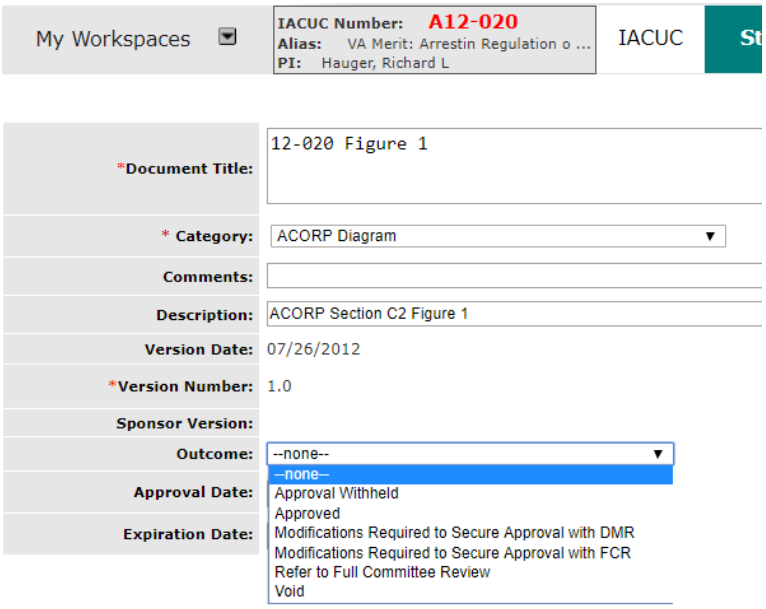
Study Document Outcome List Implementation – Application Side

Study document outcomes are assigned by the applicable review board, making this functionality inapplicable on the application side.

Study Document Outcome List Implementation – Board Side

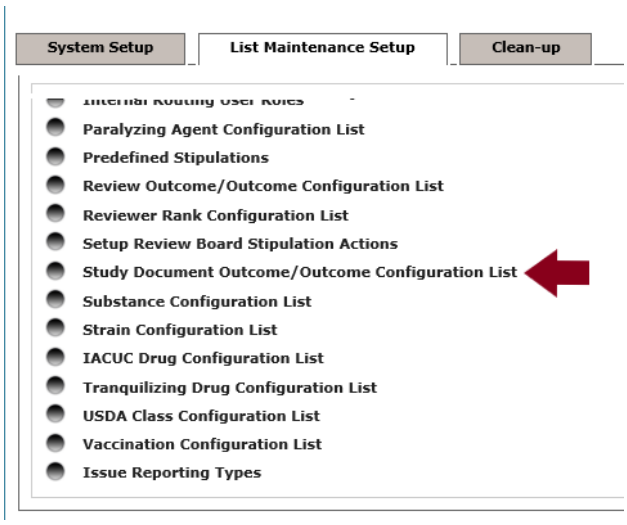
The study document outcome list is employed in the following areas on the review board / system setup side of iRIS™.

Submission processing — the Study Document Outcome list is employed as a dropdown picklist in the **Outcome** field when approving a study document within submission processing screens

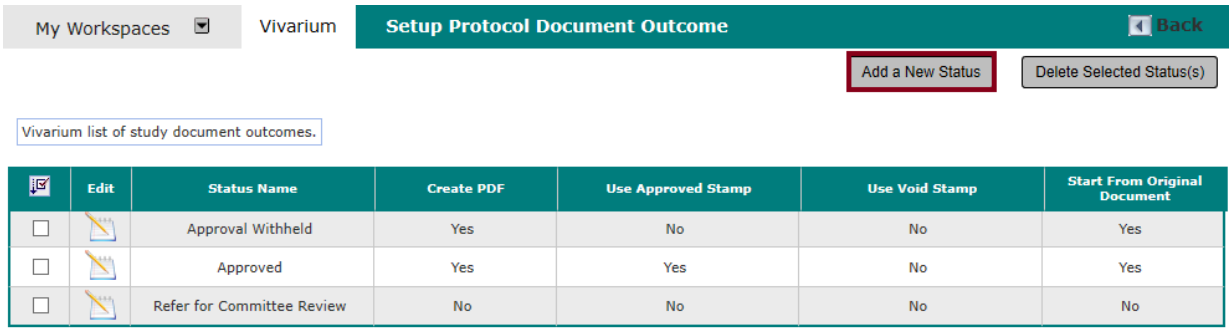


Add Study Document Outcome

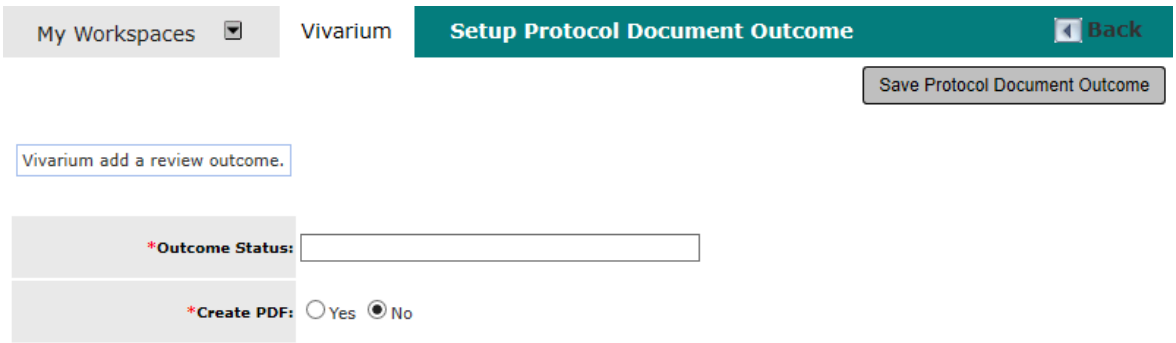
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Study Document Outcome / Outcome Configuration List** link.



The **Setup Protocol Document Outcome** page is opened. Click the **Add a New Status** button.

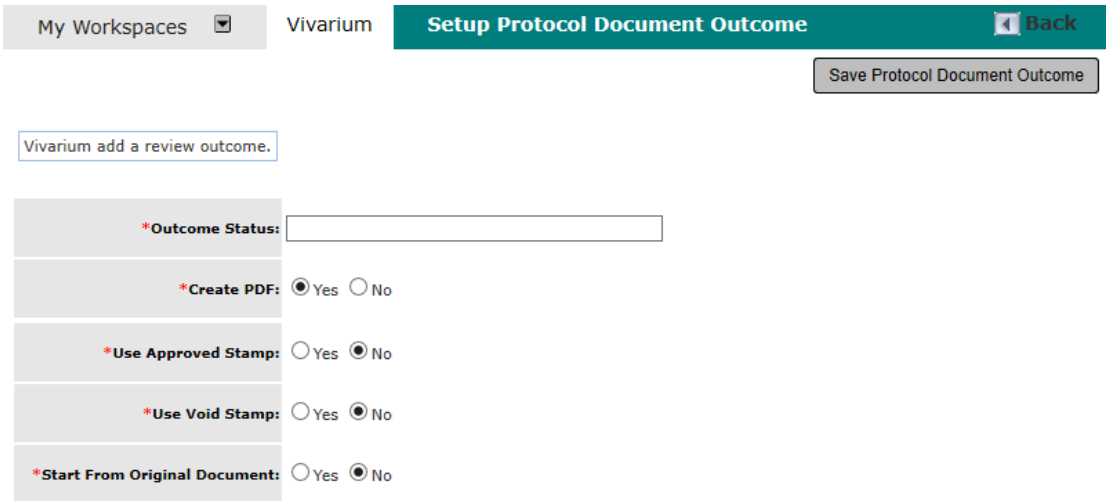


An **add a review outcome** panel is opened for creation of the new record. Below, the blank form is shown with the default selection of "No" in place for **Create PDF**.



When "Yes" is selected for **Create PDF**, indicating that the document given this outcome is to be converted to a PDF, three additional fields pertaining PDF settings are unlocked with default selections set to "No".

*Note that **Create PDF** must be set to "Yes" for any document to which an electronic document stamp will be applied.*



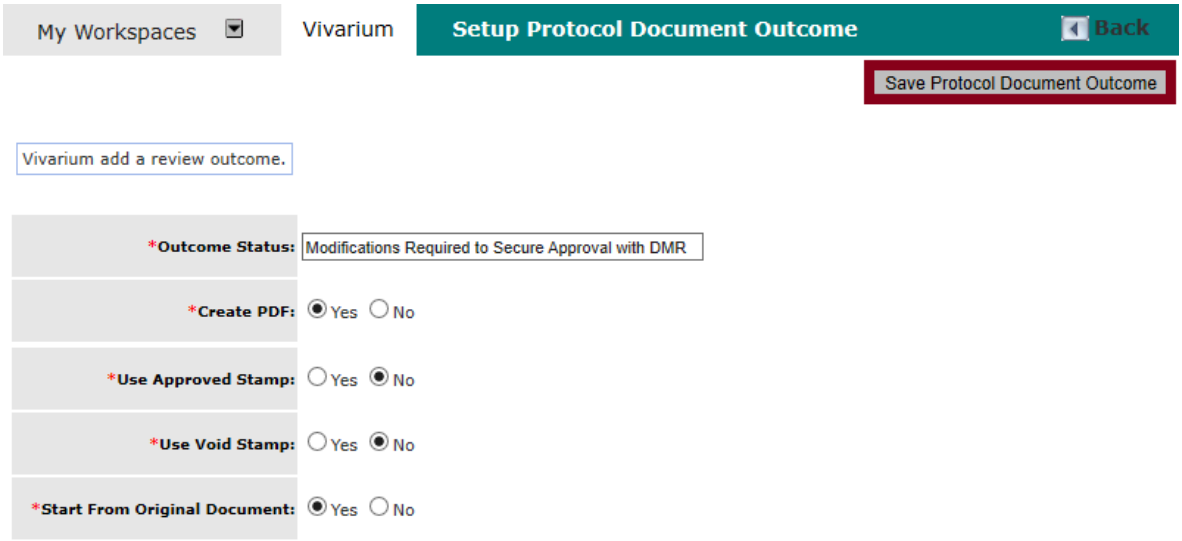
Use Approved Stamp – This option is only available where the review board property "rb.stamp_study_doc" review board property "rb.stamp_study_doc" (under Animal Resource Center > Review Board Administration > Board Configuration Options > Document Processing) is turned on. When this option is set to "Yes", the study document PDF with this outcome assigned will have an electronic approval stamp applied.

Use Void Stamp – When this option is set to "Yes", the study document PDF with this outcome assigned will have an electronic VOID watermark applied.

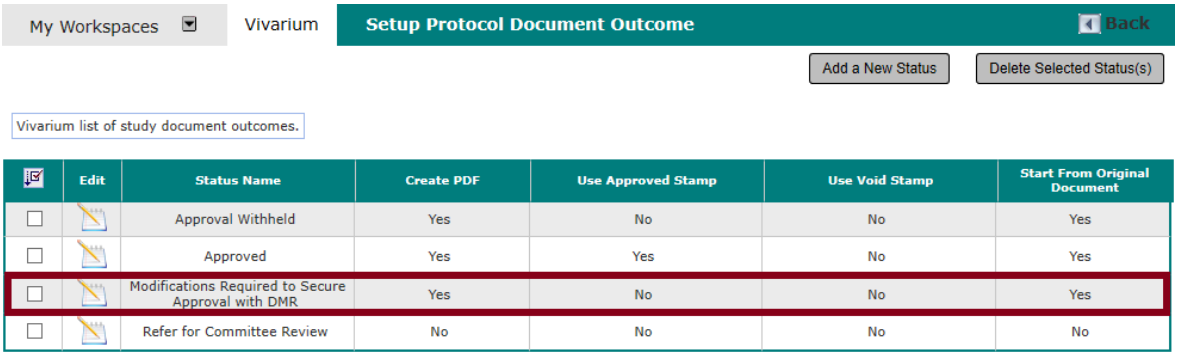
Start From Original Document - When this option is set to "Yes", the assigned outcome is applied to the original document. When this option is set to "No", the assigned outcome is applied to a PDF of the original document that was previously created as part of a prior outcome.

This setting is useful in cases where the review board needs to revisit a study document and assign a different outcome. For example, when a PDF document with a VOID watermark is subsequently approved, ***Start from Original Document*** *must be set to "Yes" to ensure the VOID watermark is removed from the document.*

Fill the form as desired and click the **Save Study Document Outcome** button.



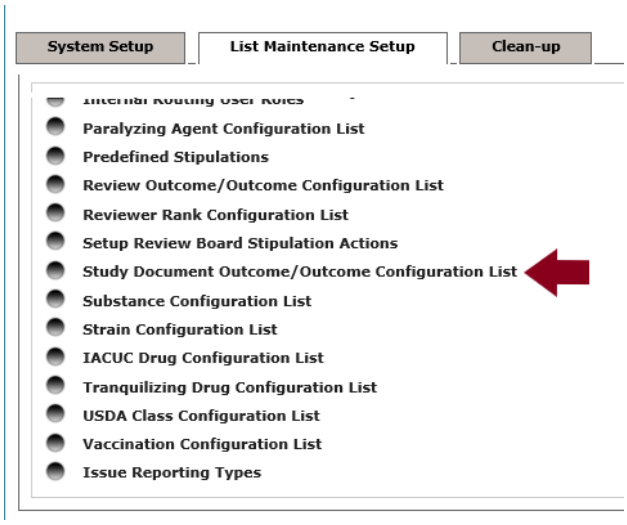
The outcome is added on the **Setup Protocol Document Outcome** list page.



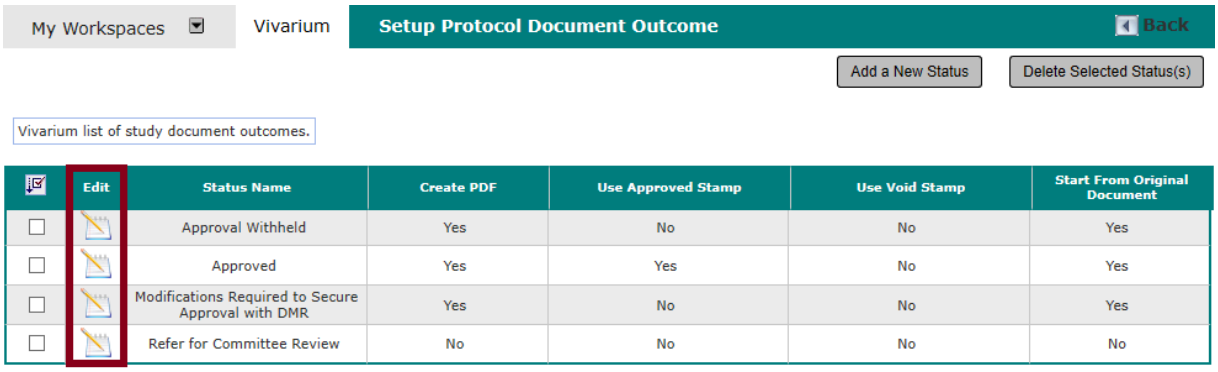
Edit	Status Name	Create PDF	Use Approved Stamp	Use Void Stamp	Start From Original Document
	Approval Withheld	Yes	No	No	Yes
	Approved	Yes	Yes	No	Yes
	Modifications Required to Secure Approval with DMR	Yes	No	No	Yes
	Refer for Committee Review	No	No	No	No

Edit Study Document Outcome

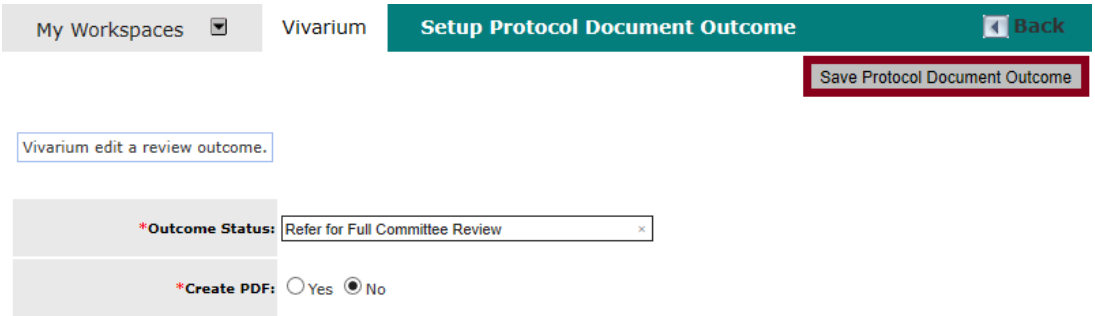
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Study Document Outcome / Outcome Configuration List** link.



The **Setup Protocol Document Outcome** page is opened. Click the icon in the **Edit** column for the applicable record.

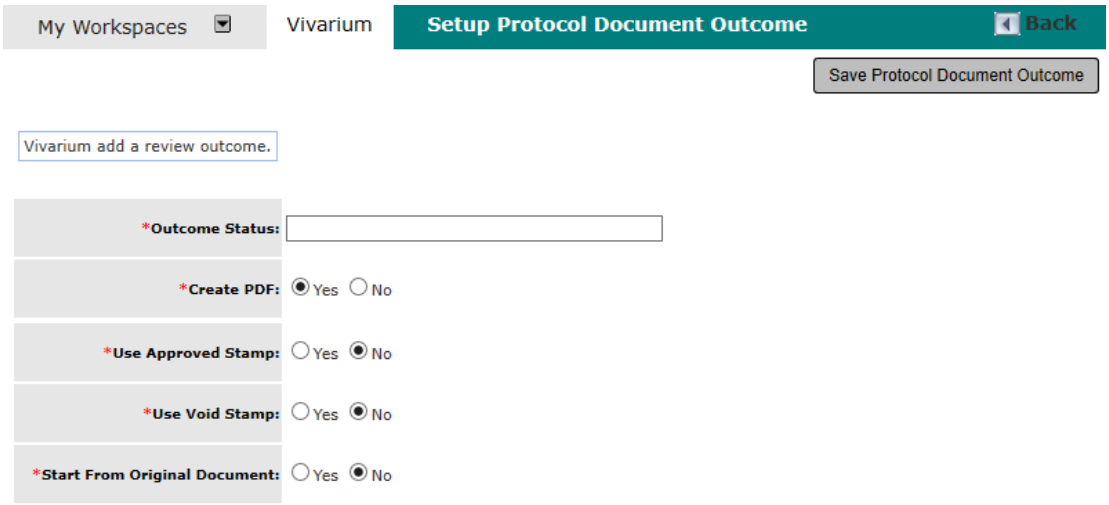


The record is opened in an **edit a review outcome** panel.



When "Yes" is selected for **Create PDF**, indicating that the document given this outcome is to be converted to a PDF, three additional fields pertaining PDF settings are unlocked with default selections set to "No".

*Note that **Create PDF** must be set to "Yes" for any document to which an electronic document stamp will be applied.*



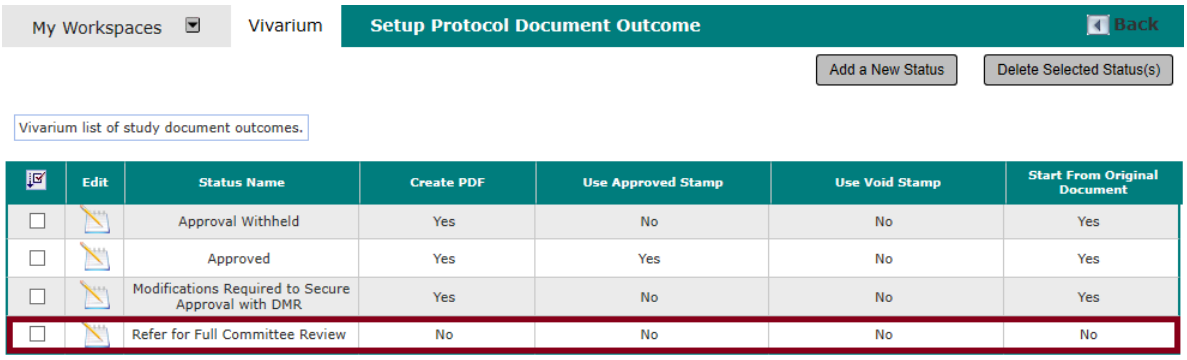
Use Approved Stamp – This option is only available where the Review Board Property "rb.stamp_study_doc" review board property "rb.stamp_study_doc" (under Animal Resource Center > Review Board Administration > Board Configuration Options > Document Processing) is turned on. When this option is set to "Yes", the study document PDF with this outcome assigned will have an electronic approval stamp applied.

Use Void Stamp – When this option is set to "Yes", the study document PDF with this outcome assigned will have an electronic **VOID** watermark applied.

Start From Original Document - When this option is set to "Yes", the assigned outcome is applied to the original document. When this option is set to "No", the assigned outcome is applied to a PDF of the original document that was previously created as part of a prior outcome.

*This setting is useful in cases where the review board needs to revisit a study document and assign a different outcome. For example, when a PDF document with a VOID watermark is subsequently approved, **Start from Original Document** must be set to "Yes" to ensure the VOID watermark is removed from the document.*

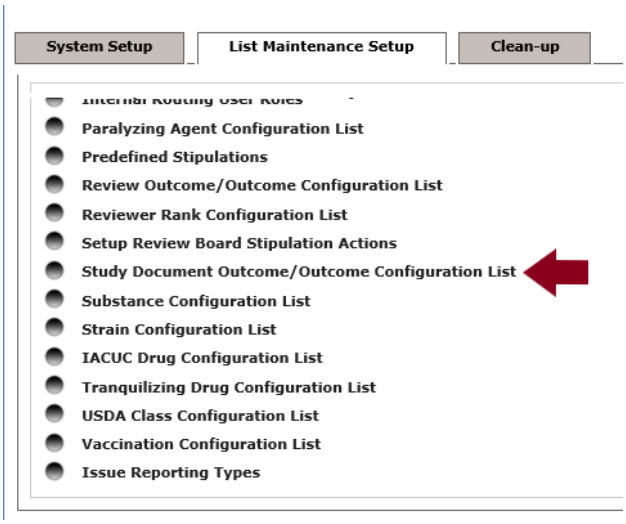
Edit the record as desired and click the **Save Protocol Document Outcome** button. The edit panel is closed, and the record is revised on the **Setup Protocol Document Outcome** list page.



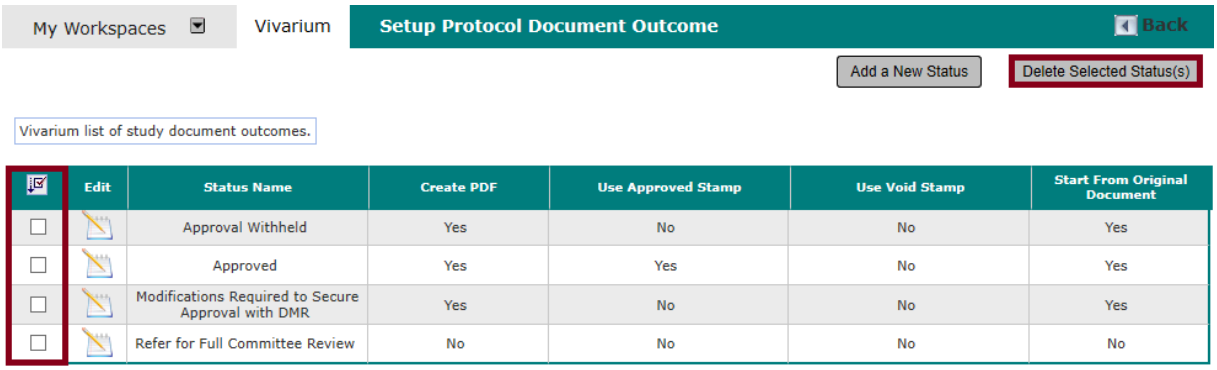
Edit	Status Name	Create PDF	Use Approved Stamp	Use Void Stamp	Start From Original Document
	Approval Withheld	Yes	No	No	Yes
	Approved	Yes	Yes	No	Yes
	Modifications Required to Secure Approval with DMR	Yes	No	No	Yes
	Refer for Full Committee Review	No	No	No	No

Delete Study Document Outcome

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Study Document Outcome / Outcome Configuration List** link.

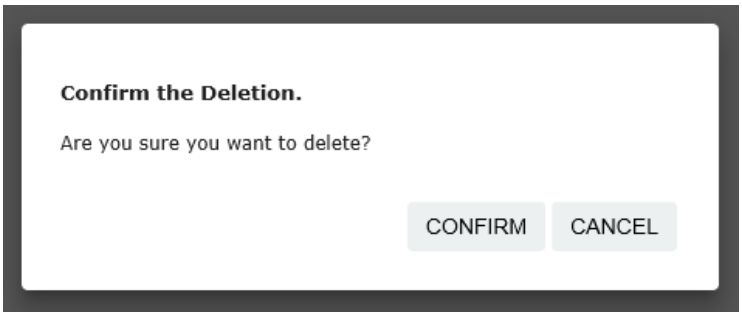


The **Setup Protocol Document Outcome** page is opened. Select the checkbox(es) in the far-left column for the record(s) to be deleted and click the **Delete Selected Status(s)** button.



Edit	Status Name	Create PDF	Use Approved Stamp	Use Void Stamp	Start From Original Document
	Approval Withheld	Yes	No	No	Yes
	Approved	Yes	Yes	No	Yes
	Modifications Required to Secure Approval with DMR	Yes	No	No	Yes
	Refer for Full Committee Review	No	No	No	No

A confirmation popup window displays.

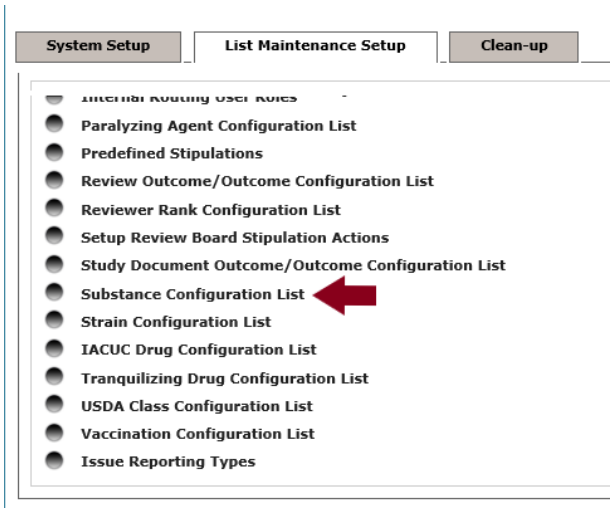


Click **CANCEL** to close the popup without deleting the record and return to the **Setup Protocol Document Outcome** page.

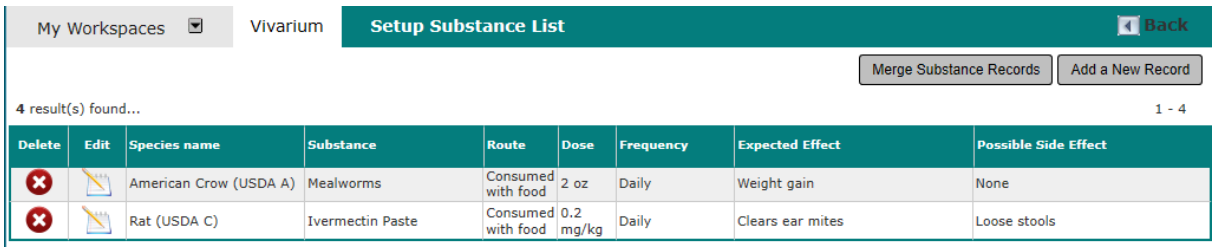
Click **CONFIRM** to complete deletion of the record and return to the **Setup Protocol Document Outcome** page. The record is deleted from the **Setup Protocol Document Outcome** page.

Substance Configuration List

The Substance Configuration List is where a list of medicinal, nutritional and other substances approved by the institution for use in studies is maintained in the iRIS™ system. To view the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Substance Configuration List** link.



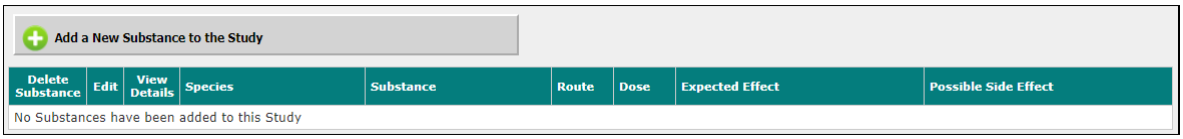
The **Setup Substance List** page is opened.



Substance List Implementation – Application Side

The substance list is employed in the following areas on the application side of iRIS™.

Study application — the Substance Configuration List is available in the IACUC / ARC study application



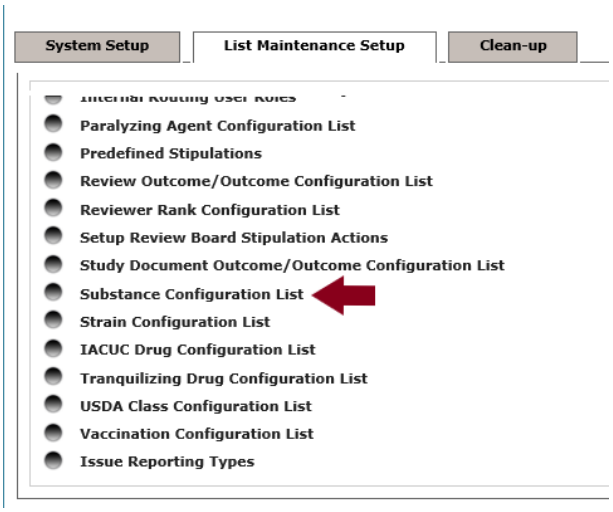
For more information about the IACUC study application, see the iRIS™ IACUC Assistant - IACUC Assistant Manual.

Substance List Implementation – Board Side

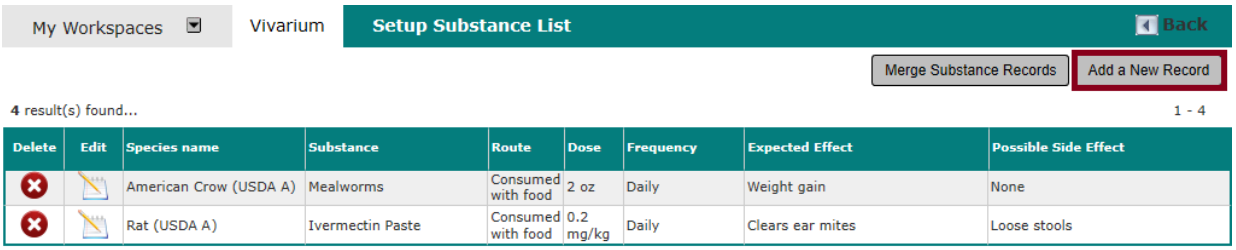
Substances are added on the application side where required and are not generally subject to direct revision by the board.

Add Substance

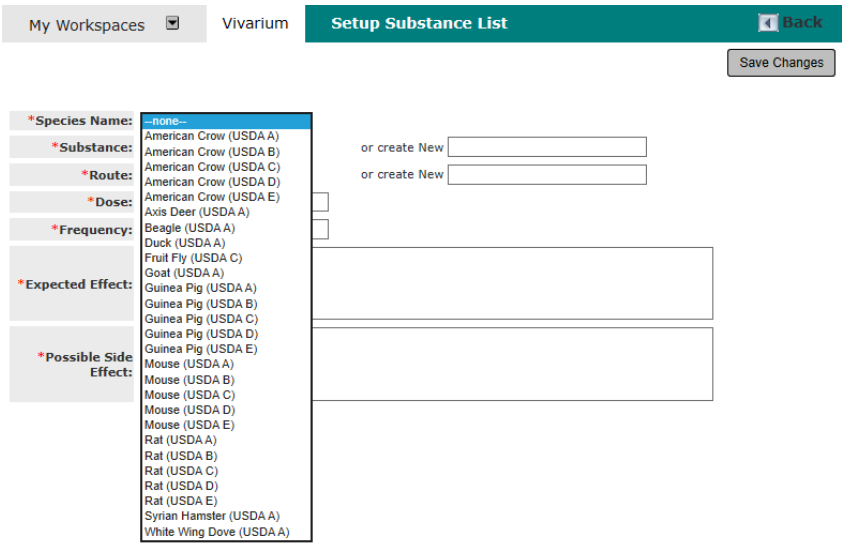
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Substance Configuration List** link.



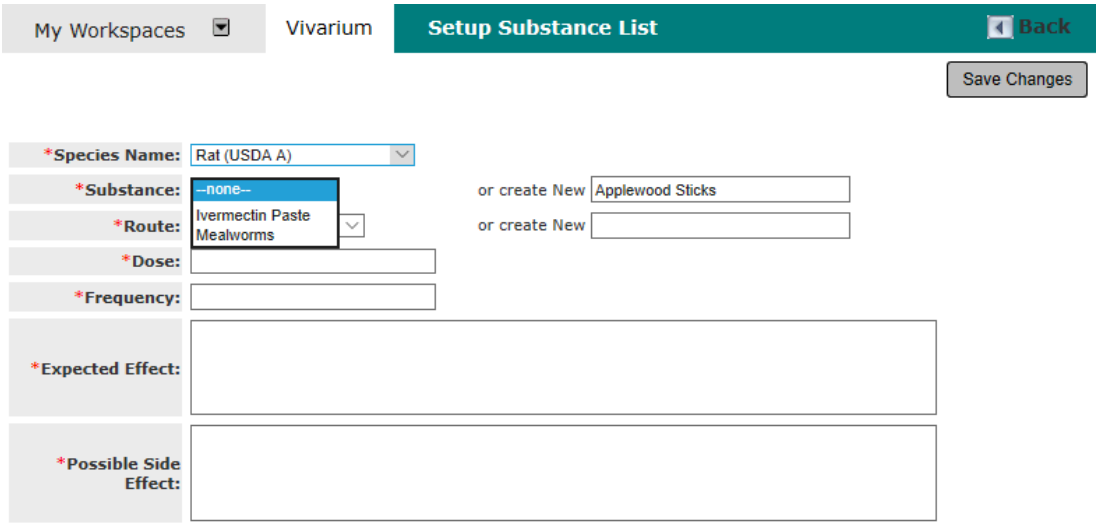
The **Setup Substance List** page is opened. Click the **Add a New Record** button.



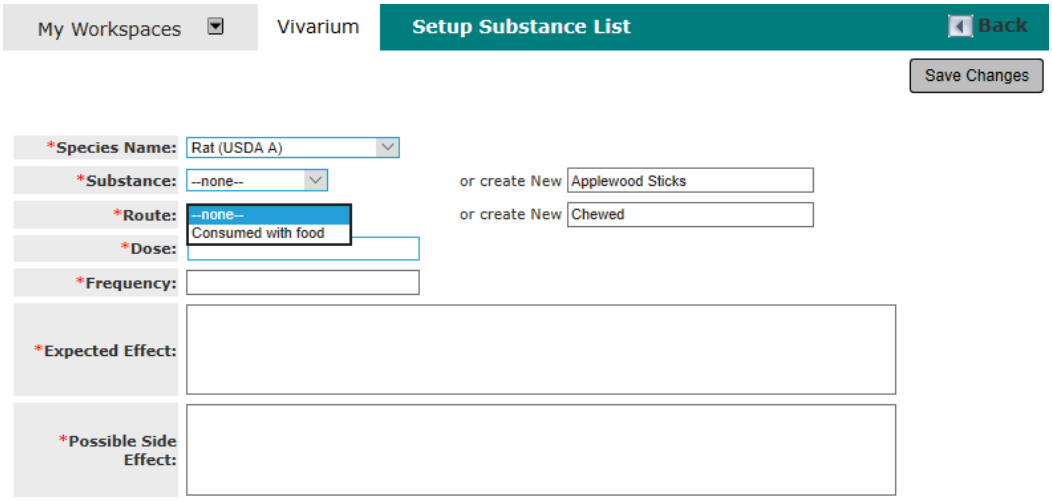
An add panel is opened for creation of the new record. Click on the **Species Name** dropdown list to open it and select the desired species.



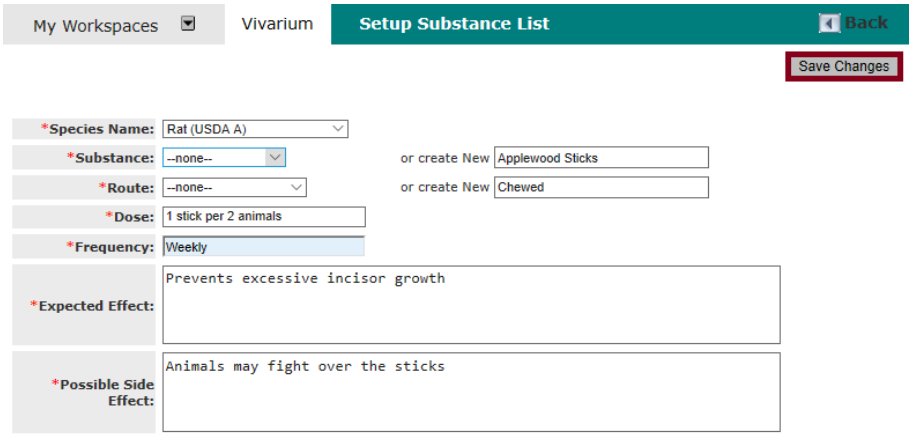
Click on the **Substance** dropdown list to open it. If the desired item is not in the list, manually enter it in the **or create New** field directly to the right of the dropdown list.



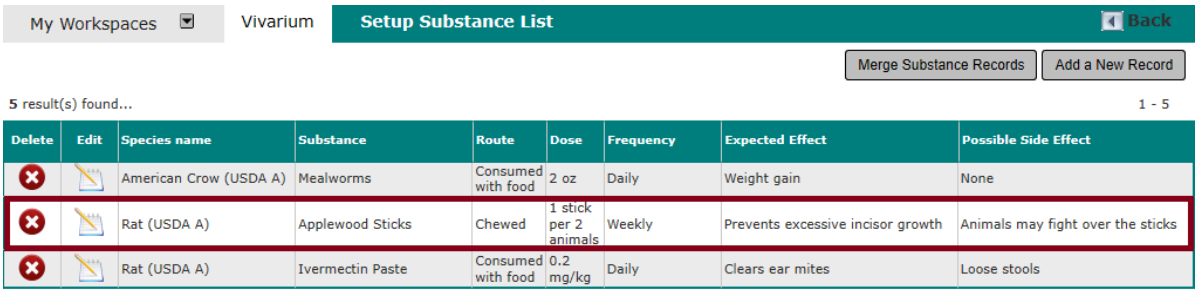
Click on the **Route** dropdown list to open it. If the desired item is not in the list, manually enter it in the **or create New** field directly to the right of the dropdown list.



Enter **Dose, Frequency, Expected Effect** and **Possible Side Effect** details, then click the **Save Changes** button to save the record and close the add panel.

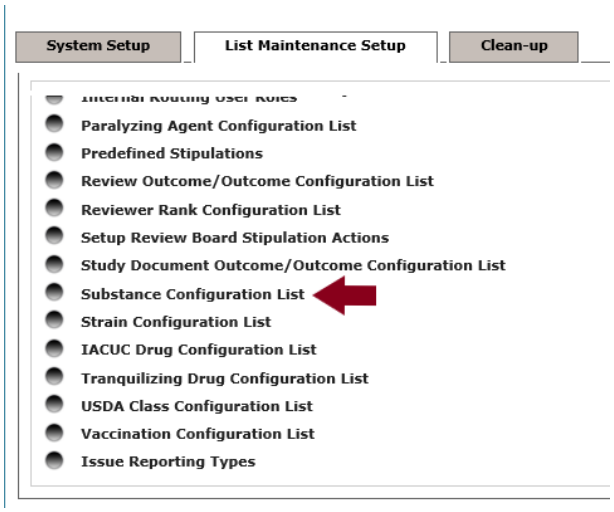


The new record is added on the **Setup Substance List** page.

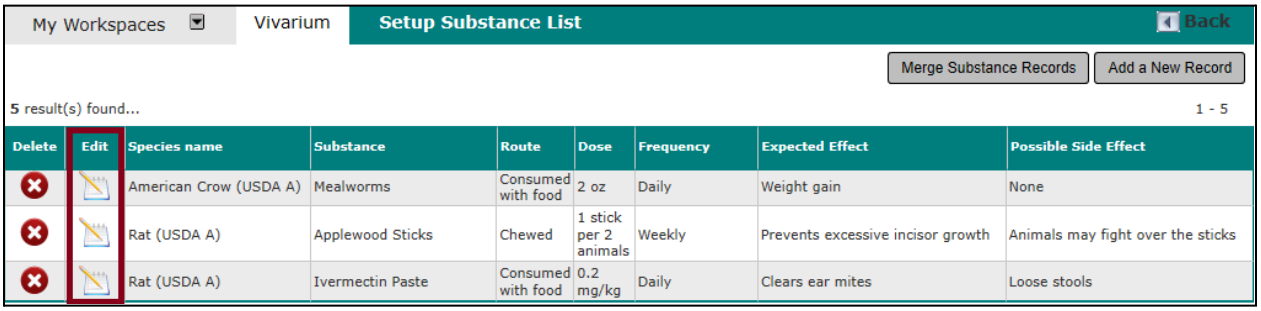


Edit Substance

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Substance Configuration List** link.

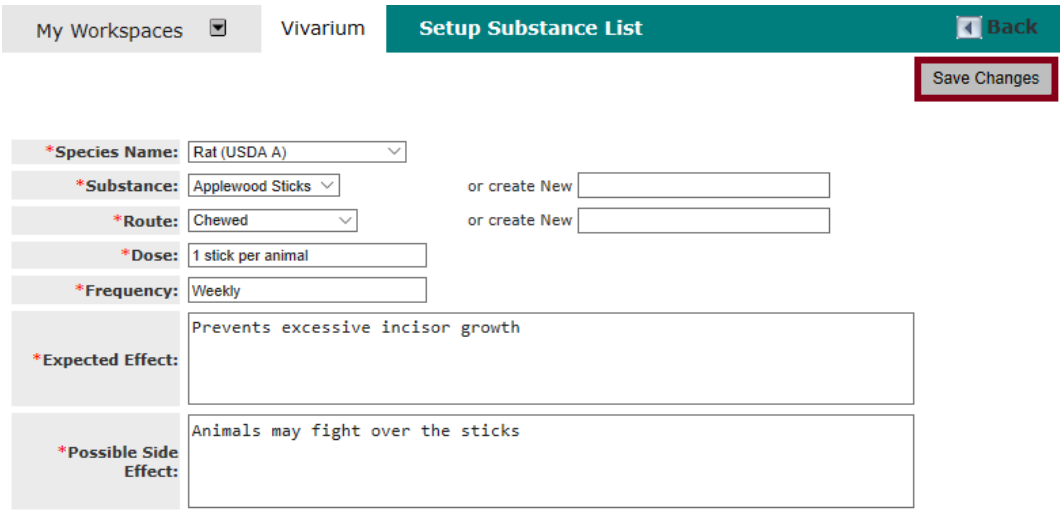


The **Setup Substance List** page is opened. Click the icon in the **Edit** column for the applicable record.

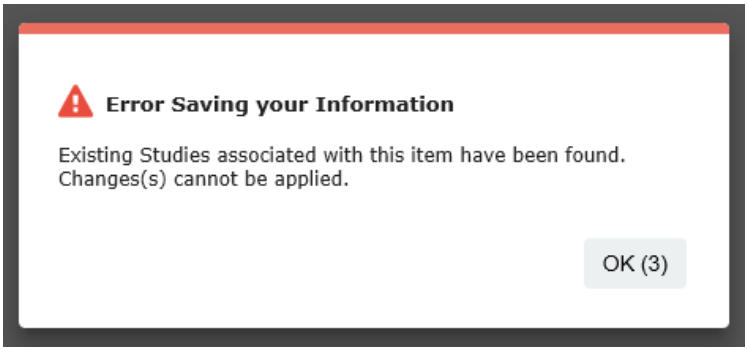


Delete	Edit	Species name	Substance	Route	Dose	Frequency	Expected Effect	Possible Side Effect
		American Crow (USDA A)	Mealworms	Consumed with food	2 oz	Daily	Weight gain	None
		Rat (USDA A)	Applewood Sticks	Chewed	1 stick per 2 animals	Weekly	Prevents excessive incisor growth	Animals may fight over the sticks
		Rat (USDA A)	Ivermectin Paste	Consumed with food	0.2 mg/kg	Daily	Clears ear mites	Loose stools

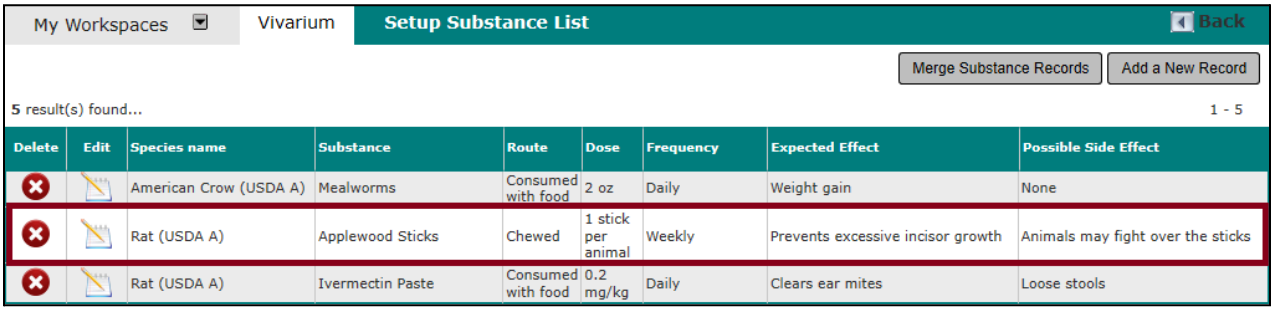
The record is opened in an edit panel. Make desired changes and click the **Save Changes** button.



When an attempt is made to change the **Species Name** or **Substance** in a record that is already assigned to one or more studies the following warning popup window appears, and the record is not edited.



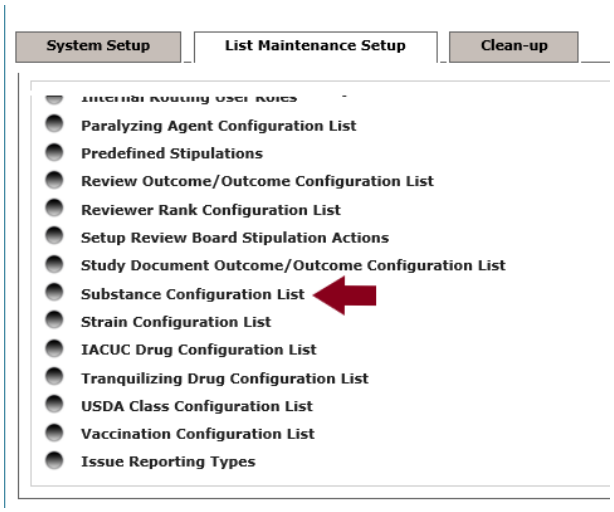
Otherwise, the record is revised on the **Setup Substance List** page.



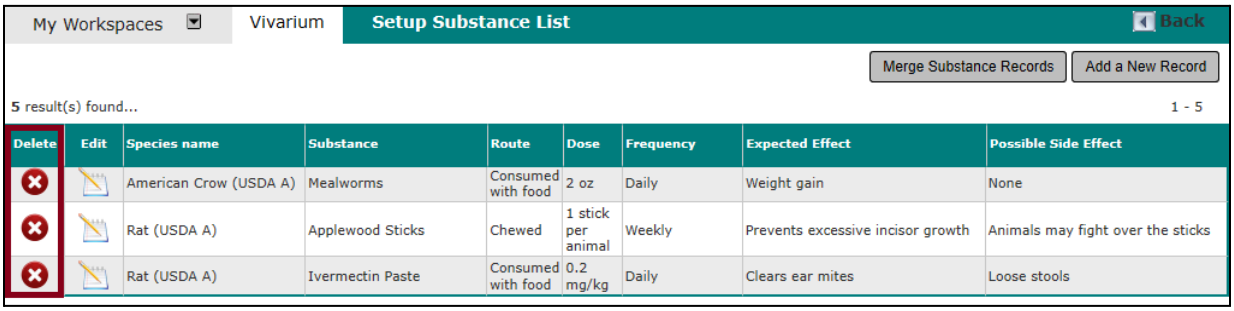
Delete	Edit	Species name	Substance	Route	Dose	Frequency	Expected Effect	Possible Side Effect
		American Crow (USDA A)	Mealworms	Consumed with food	2 oz	Daily	Weight gain	None
		Rat (USDA A)	Applewood Sticks	Chewed	1 stick per animal	Weekly	Prevents excessive incisor growth	Animals may fight over the sticks
		Rat (USDA A)	Ivermectin Paste	Consumed with food	0.2 mg/kg	Daily	Clears ear mites	Loose stools

Delete Substance

Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Substance Configuration List** link.

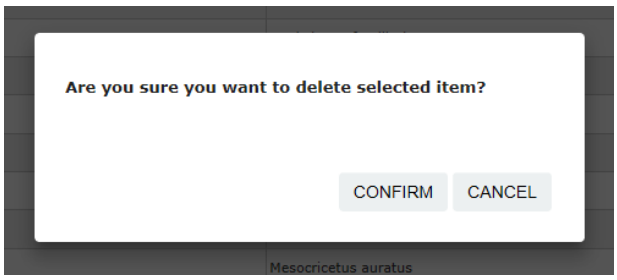


The **Setup Substance List** page is opened. Click the icon in the **Delete** column for the applicable record.



Delete	Edit	Species name	Substance	Route	Dose	Frequency	Expected Effect	Possible Side Effect
		American Crow (USDA A)	Mealworms	Consumed with food	2 oz	Daily	Weight gain	None
		Rat (USDA A)	Applewood Sticks	Chewed	1 stick per animal	Weekly	Prevents excessive incisor growth	Animals may fight over the sticks
		Rat (USDA A)	Ivermectin Paste	Consumed with food	0.2 mg/kg	Daily	Clears ear mites	Loose stools

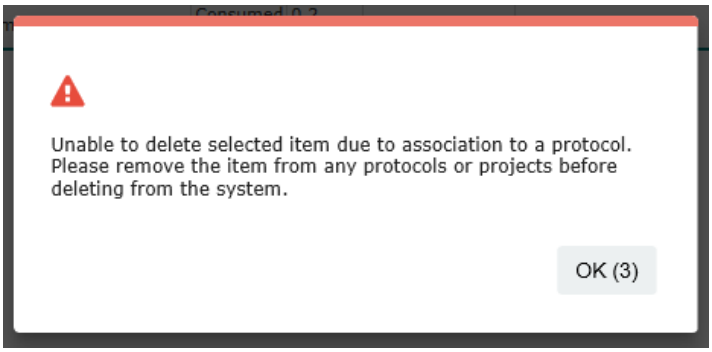
A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record and return to the **Setup Substance List** page.

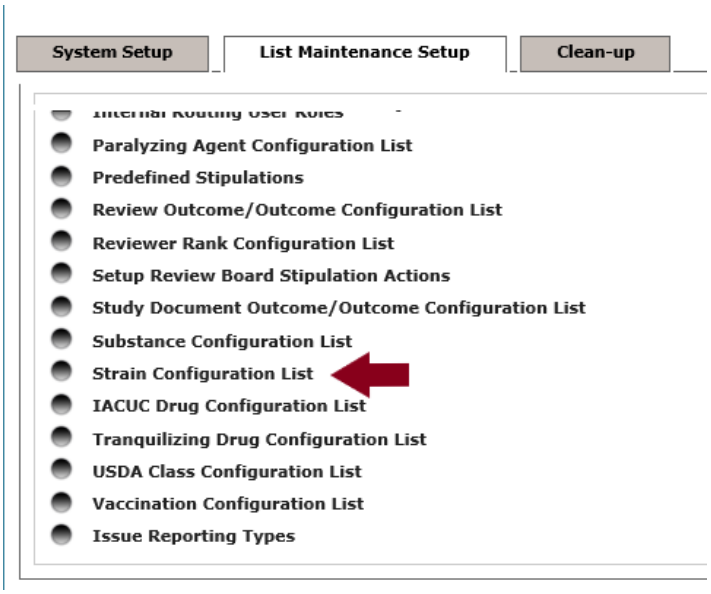
Click **CONFIRM** to complete deletion of the record and return to the **Setup Substance List** page.

When an attempt is made to delete a substance already assigned to one or more studies the following warning popup window appears, and the record is not deleted.

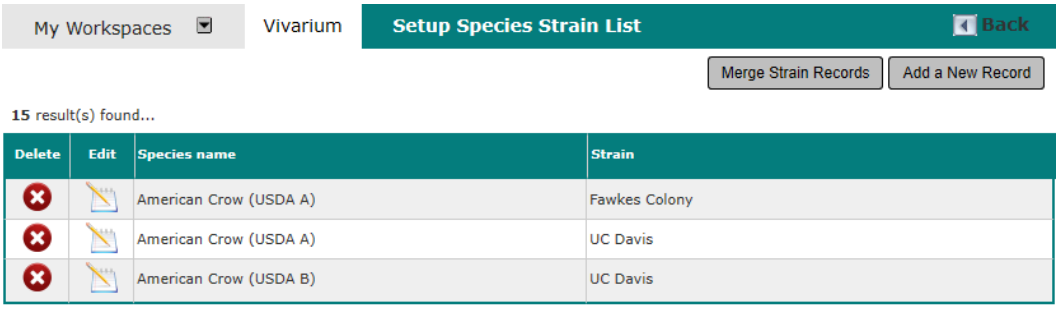


Strain Configuration List

This is where a list of animal species strains approved for use in studies is maintained in the iRIS™ system. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Strain Configuration List** link.



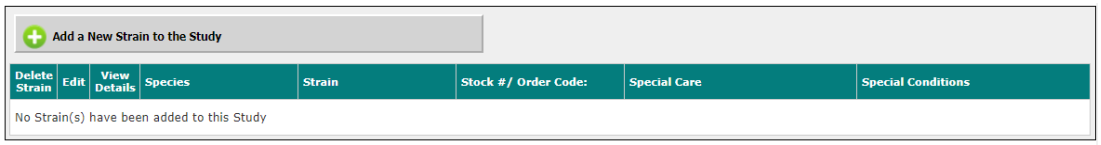
The **Strain List** page is opened.

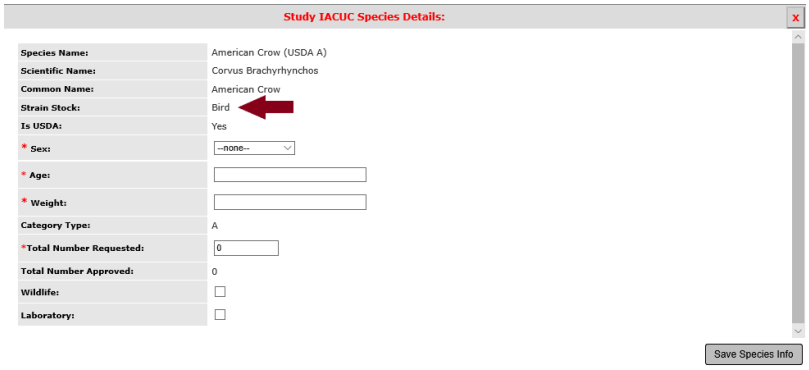


Strain List Implementation – Application Side

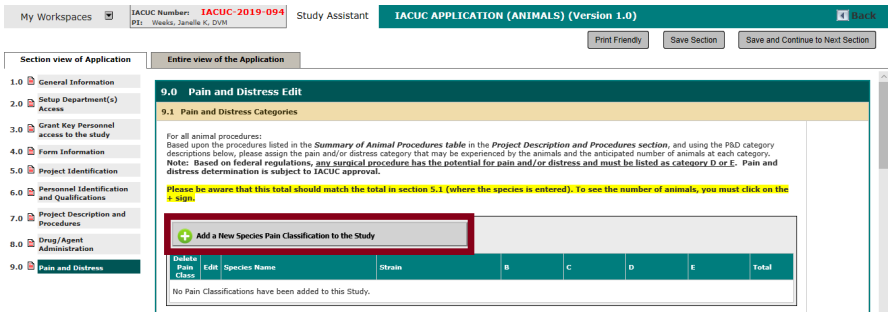
The strain list is employed in the following areas on the application side of the iRIS™ system.

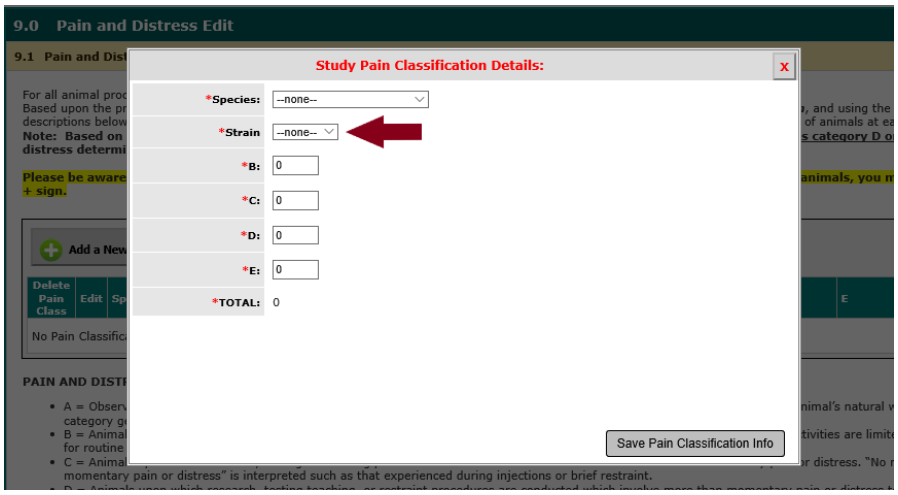
Project Identification section— a strain can be added to a study via the **Add a New Strain to the Study** button on the application form





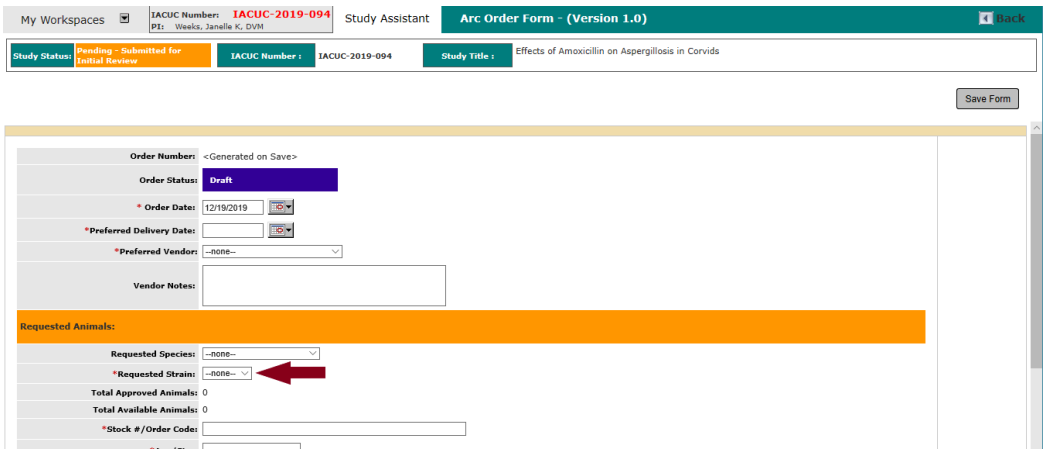
Pain and Distress section — a strain must be specified when adding a new species pain classification to the study; when the **Add a New Species Pain Classification to the Study** button is clicked, the **Study Pain Classification Details** popup is opened; strain is a required field on the popup



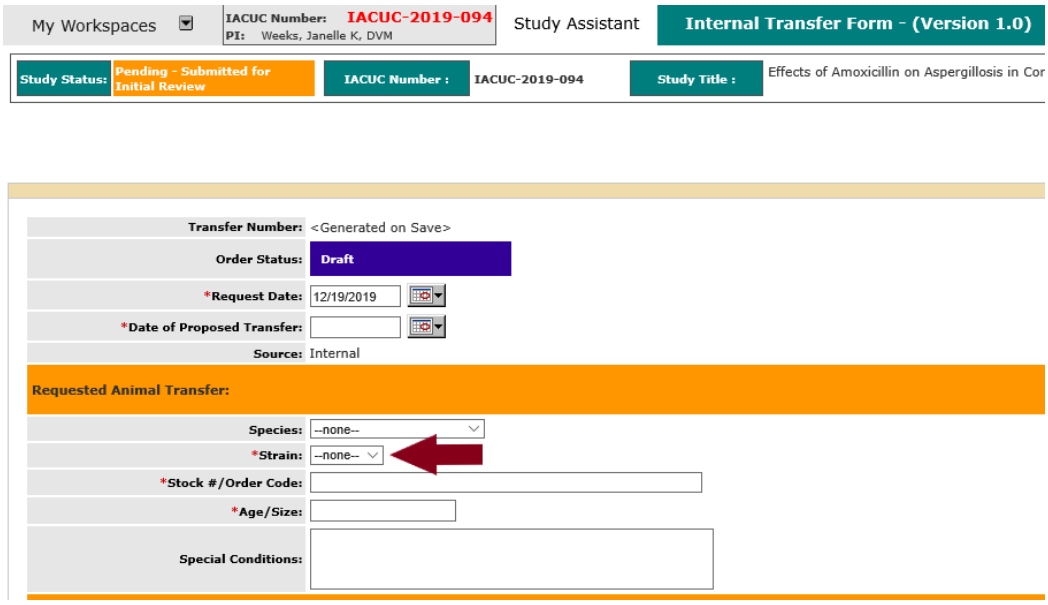


For more information about the IACUC study application, see the IACUC Assistant - IACUC Assistant Manual.

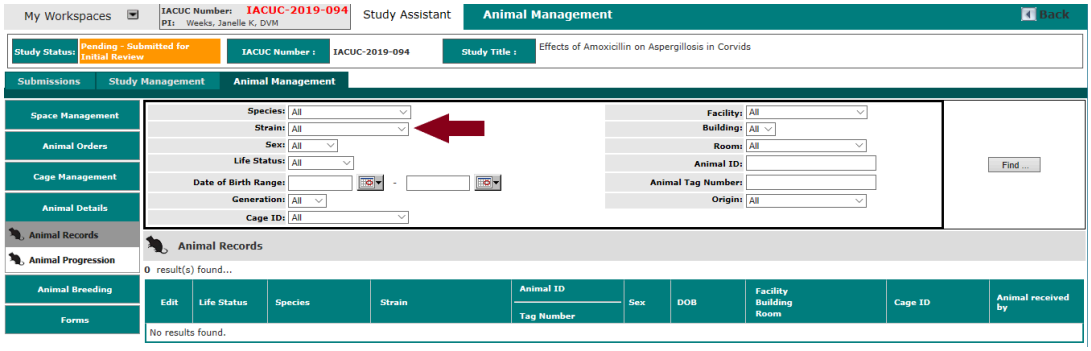
Arc Order Form — the strain list is employed in the **Requested Animals** section of the **Arc Order Form**



Internal Transfer Form — the strain list is employed in the **Requested Animal Transfer** section of the **Internal Transfer Form**



Animal Records — the strain list is employed in the search form provided in the **Animal Records** section of the **Animal Management** tab when reviewing a submission

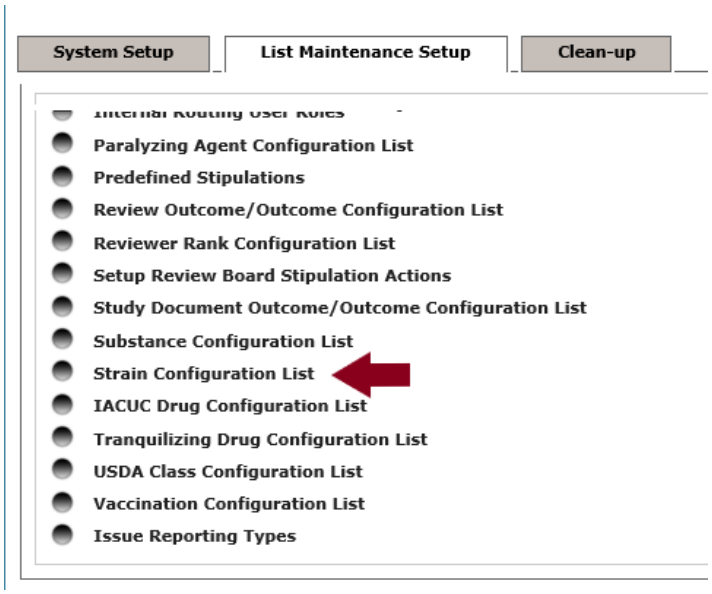


Strain List Implementation – Board Side

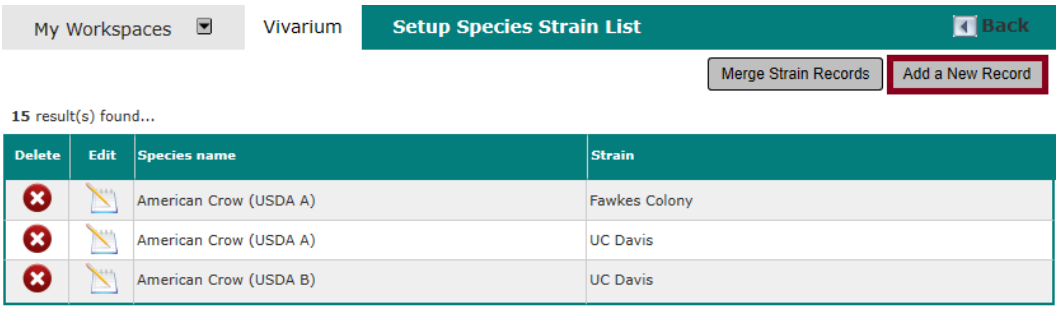
Strains are added on the application side where required and are not generally subject to direct revision by the board.

Add Strain

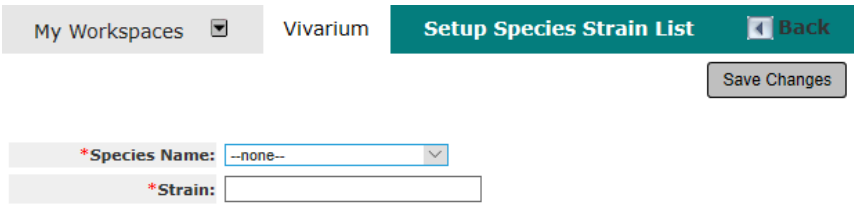
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Strain Configuration List** link.



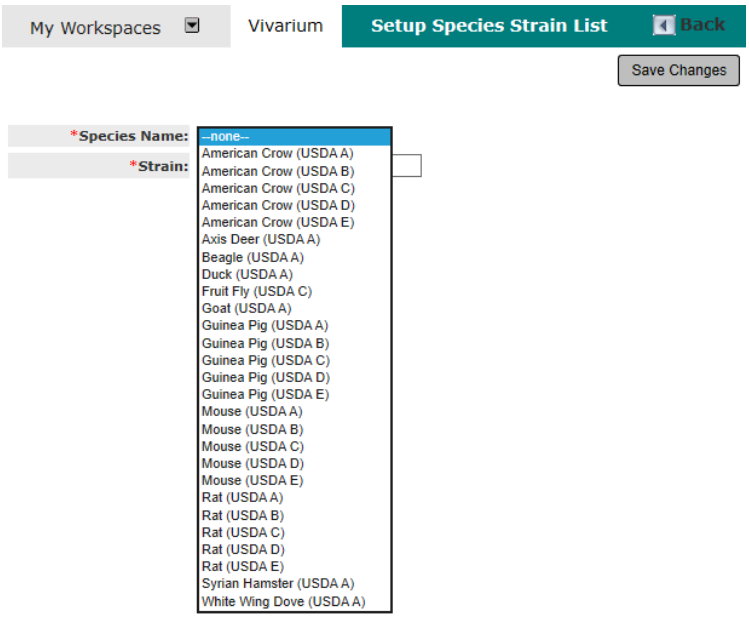
The **Setup Species Strain List** page is opened. Click the **Add a New Record** button.



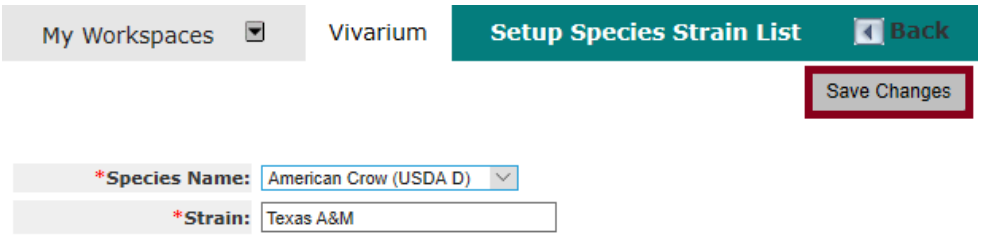
An add panel is opened for creation of the new record.



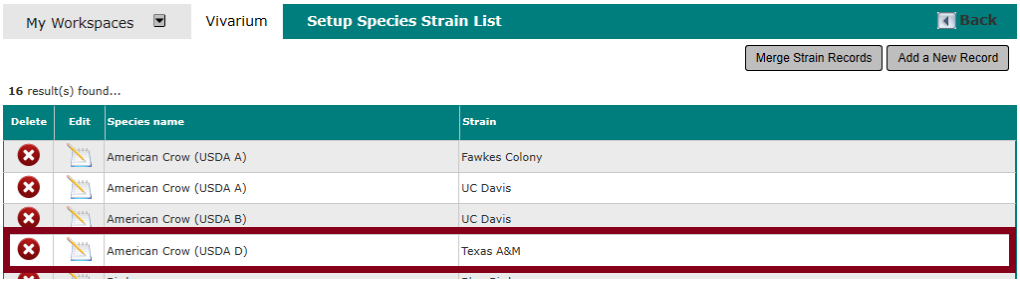
Select a **Species Name** from the dropdown list.



Enter the **Strain** name and click the **Save Changes** button.

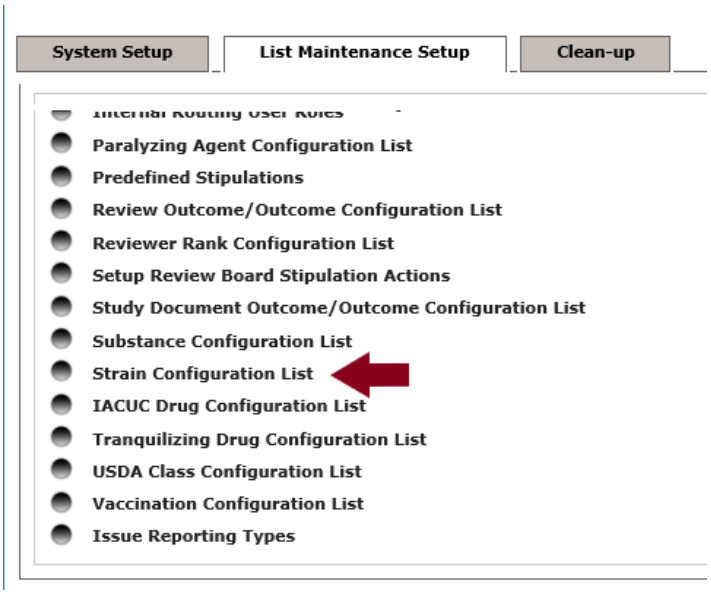


The record is added to the **Setup Species Strain List** page.

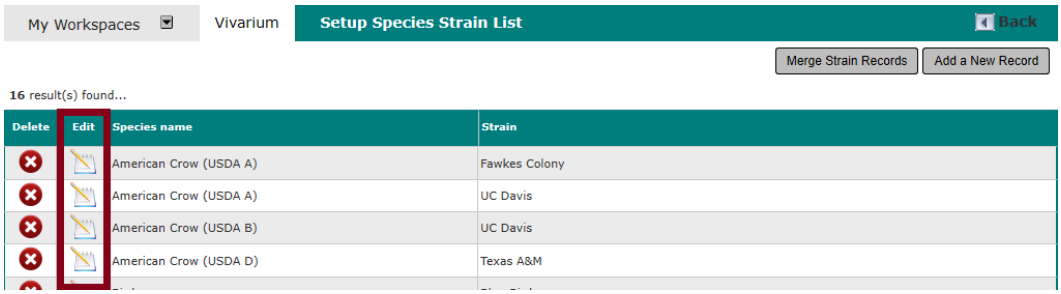


Edit Strain

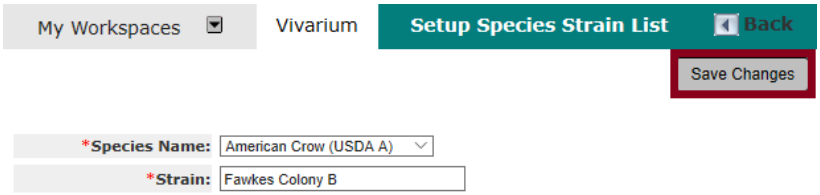
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Strain Configuration List** link.



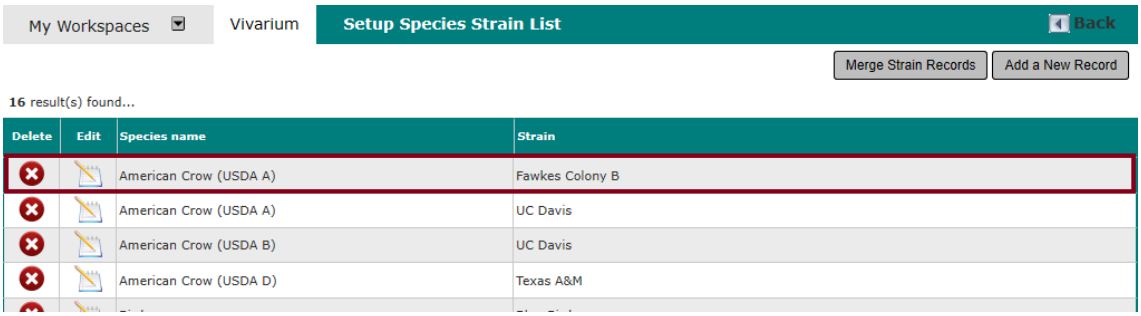
The **Setup Species Strain List** page is opened. Click the icon in the **Edit** column for the applicable record.



The record is opened in an edit panel. Make desired changes and click the **Save Changes** button.

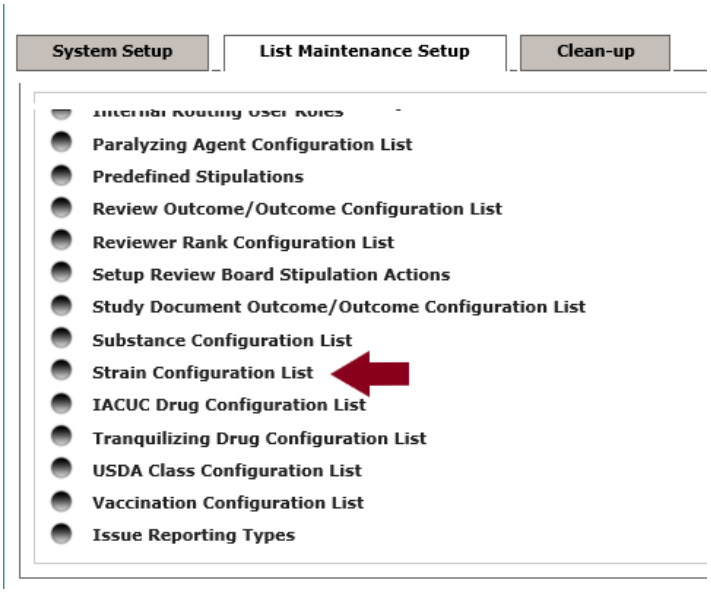


The record is revised on the **Setup Species Strain List** page.

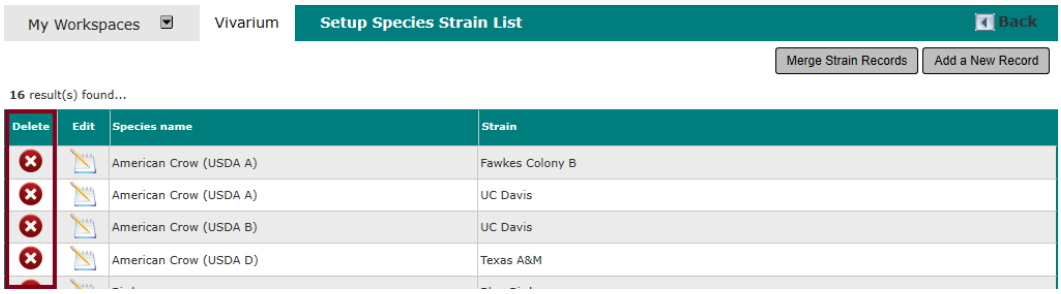


Delete Strain

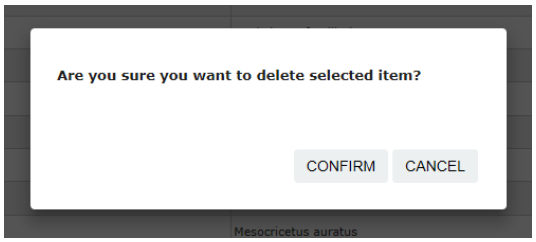
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Strain Configuration List** link.



The **Setup Species Strain List** page is opened. Click the icon in the **Delete** column for the applicable record.



A confirmation popup window displays.

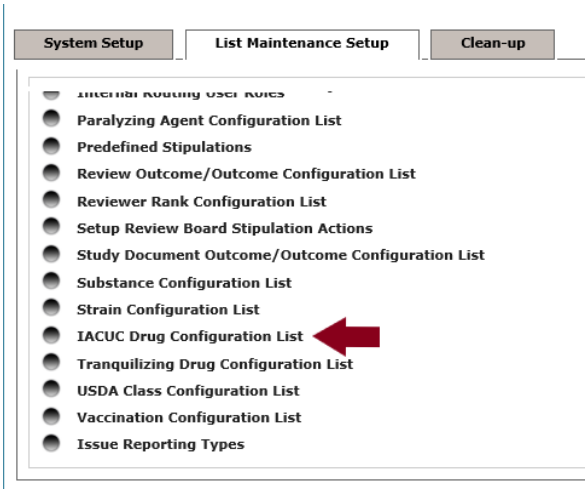


Click **CANCEL** to close the popup without deleting the record and return to the **Setup Species Strain List** page.

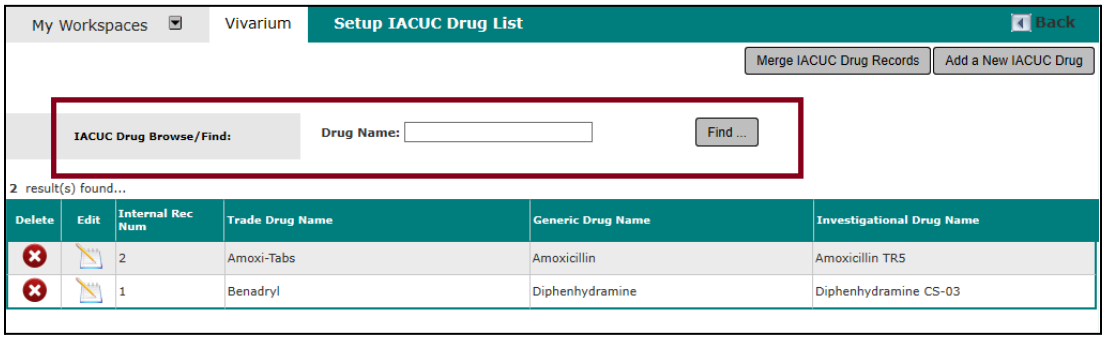
Click **CONFIRM** to complete deletion of the record and return to the **Setup Species Strain List** page.

IACUC Drug Configuration List

The **IACUC Drug Configuration List** is where a list of drugs approved by the institution for use in studies is maintained in the iRIS™ system. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **IACUC Drug Configuration List** link.



The **Setup IACUC Drug List** page is opened.

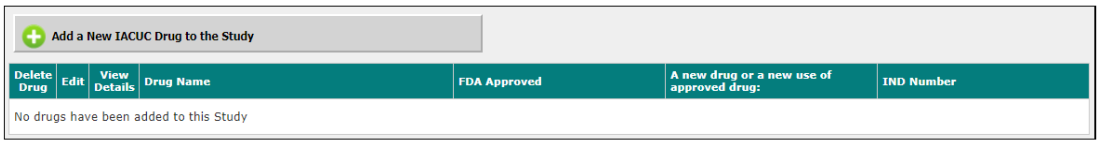


If the drug list is lengthy, use the **IACUC Drug Browse/Find** section above the list to search for records by **Drug Name**.

IACUC Drug List Implementation – Application Side

The IACUC drug list is employed in the following areas on the application side of iRIS™.

IACUC / ARC Study Application — the IACUC Drug List is made available in an IACUC / ARC application via an **Add a New IACUC Drug to the Study** button



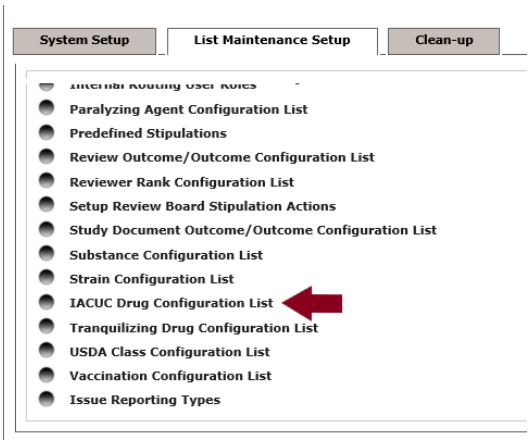
For more information about the IACUC study application, see the iRIS™ IACUC Assistant - IACUC Assistant Manual.

IACUC Drug List Implementation – Board Side

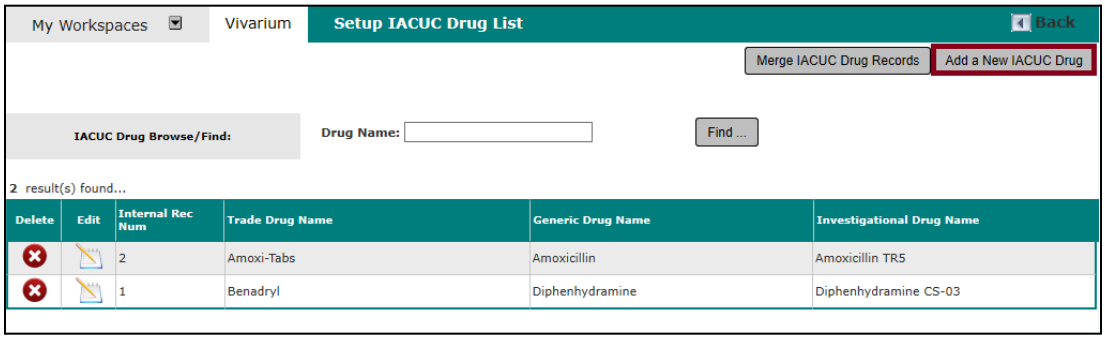
IACUC drugs are added on the application side where required and are not generally subject to direct revision by the board.

Add a New IACUC Drug

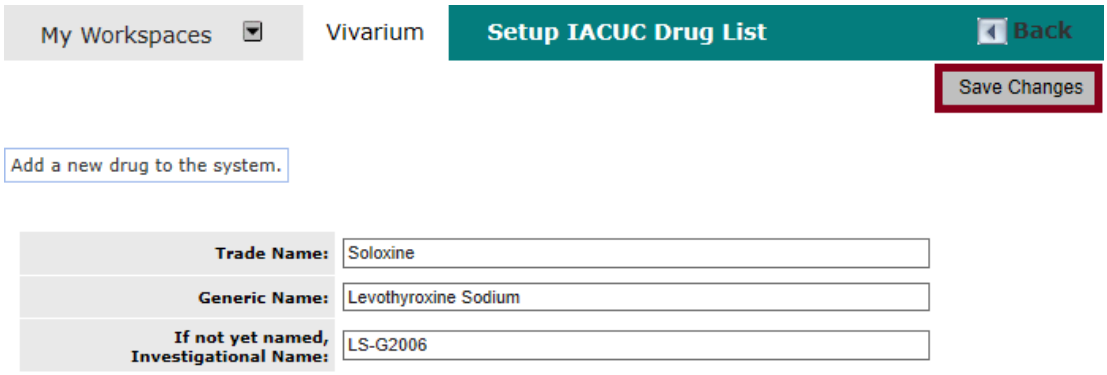
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **IACUC Drug Configuration List** link.



The **Setup IACUC Drug List** page is opened. Click the **Add a New IACUC Drug** button.



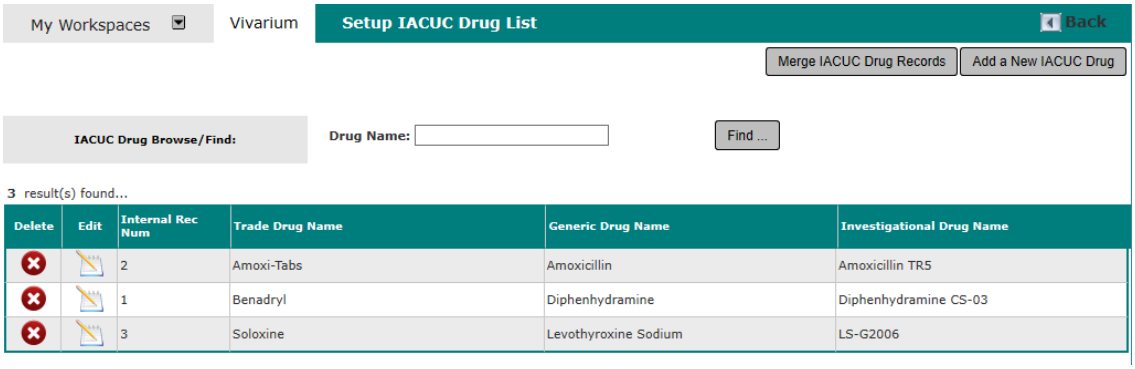
An **Add a new drug to the system** panel is opened for creation of the new record.



Enter the **Trade Name** and **Generic Name** for the drug.

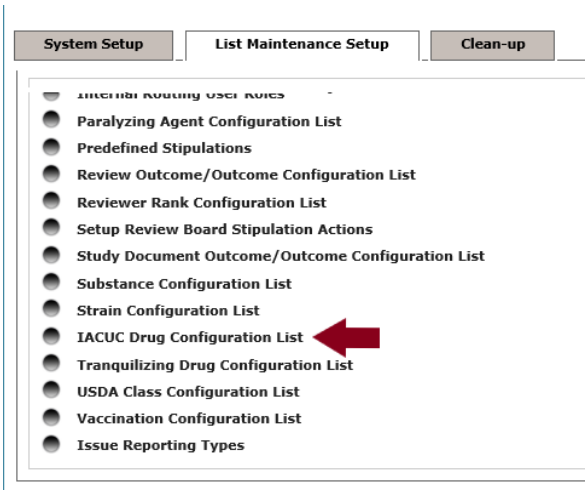
If the drug is an experimental formulation, complete the **If not yet named, Investigational Name** field.

Click the **Save Changes** button to close the add panel and save the record. The record is added on the **Setup IACUC Drug List** page.

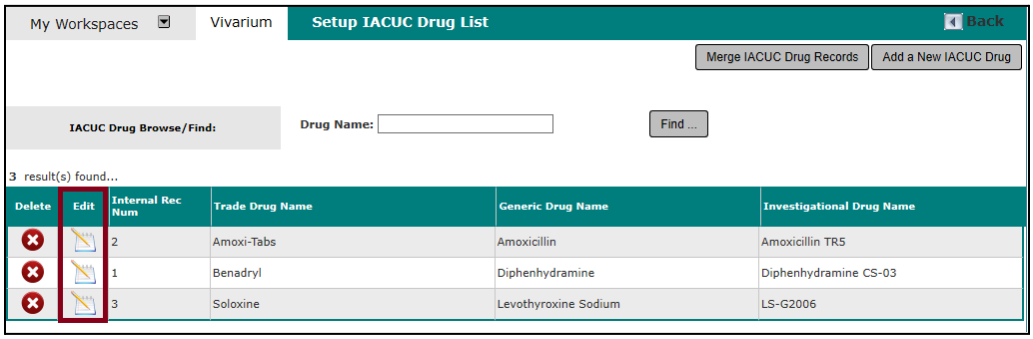


Edit IACUC Drug

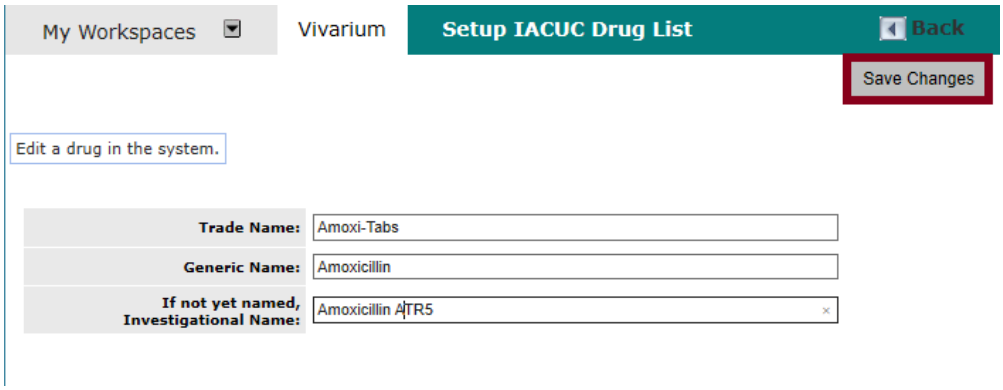
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **IACUC Drug Configuration List** link.



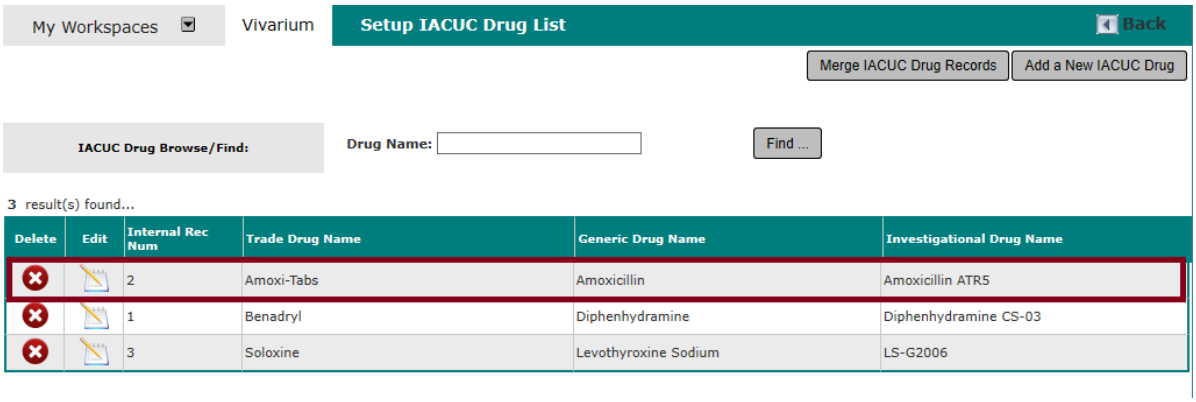
The **Setup IACUC Drug List** page is opened. Click the icon in the **Edit** column for the applicable record.



An **Edit a drug in the system** panel is opened with editable fields.

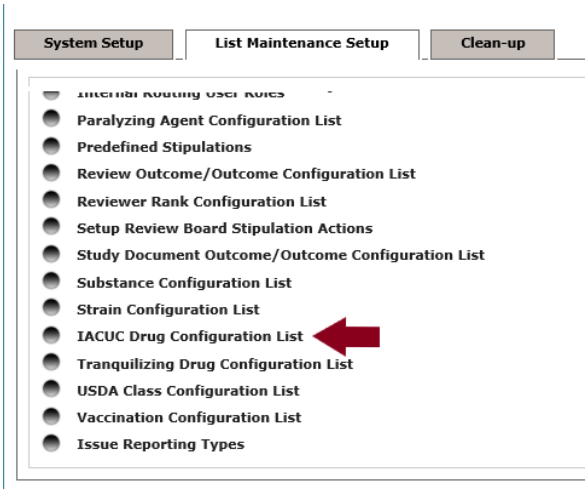


Make desired changes and click the **Save Changes** button to close the edit panel and save the record. The record is revised on the **Setup IACUC Drug List** page.

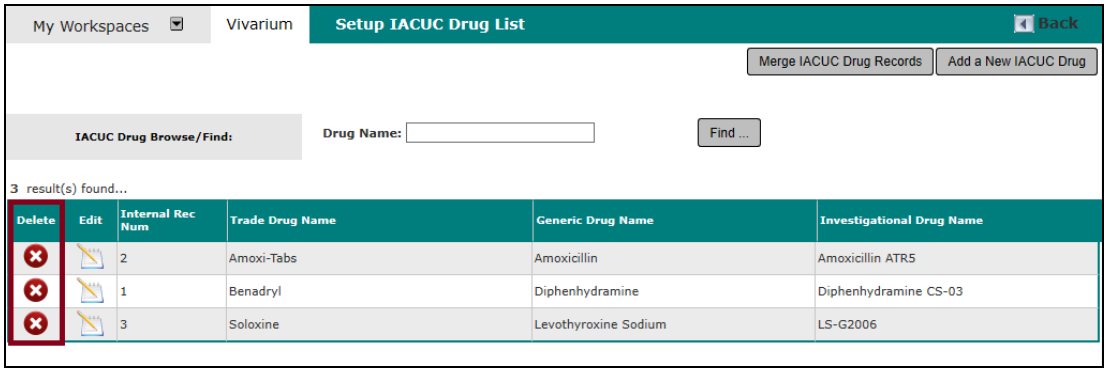


Delete IACUC Drug

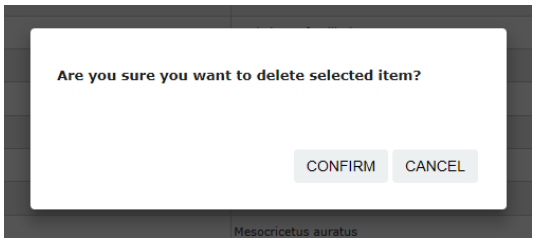
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **IACUC Drug Configuration List** link.



The **Setup IACUC Drug List** page is opened. Click the icon in the **Delete** column for the applicable record.



A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record and return to the **Setup IACUC Drug List** page.

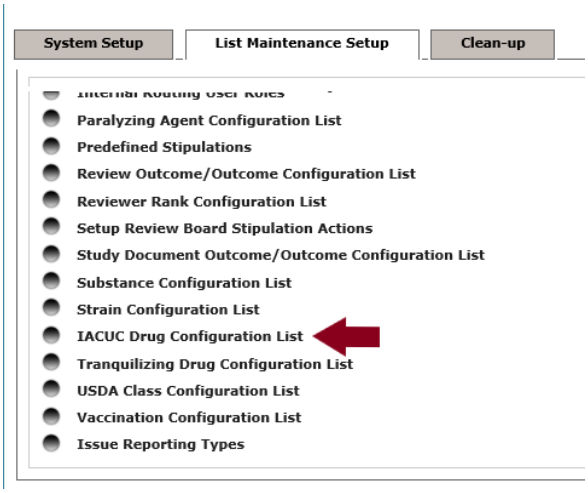
Click **CONFIRM** to complete deletion of the record and return to the **Setup IACUC Drug List** page.

Merge IACUC Drug Records

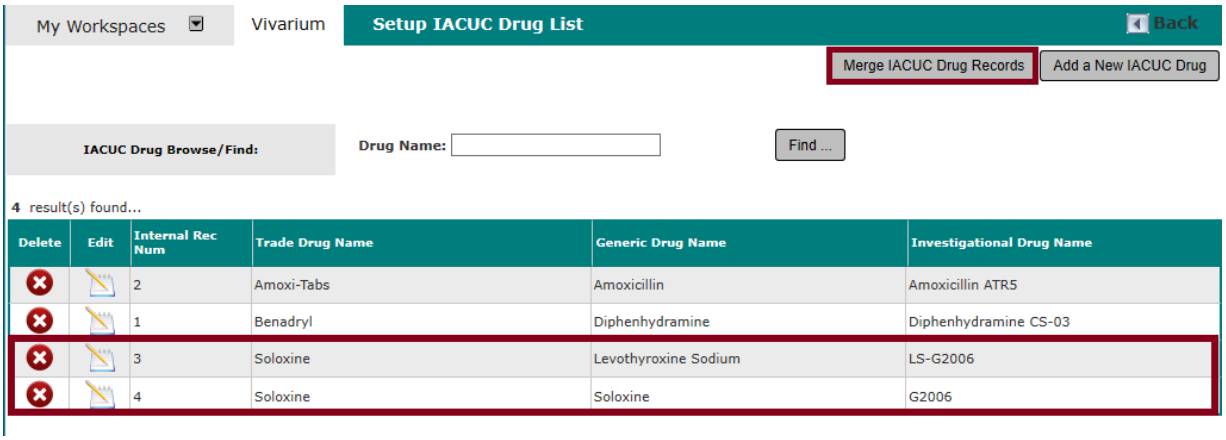
Sometimes a duplicate or erroneous IACUC drug record is created and then assigned to one or more study applications before the mistake is caught.

In that situation, the duplicate or erroneous drug record can be merged with a valid drug record. The valid drug record is then substituted for the duplicate/erroneous drug record previously assigned to study applications.

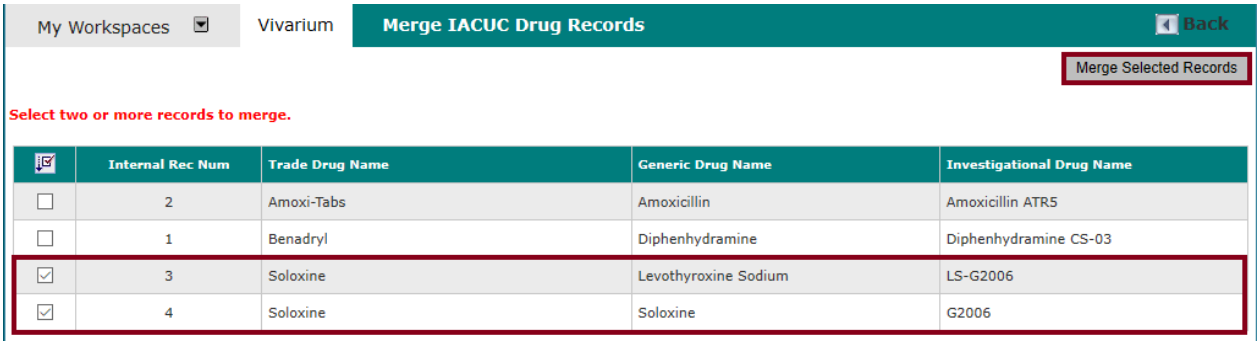
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **IACUC Drug Configuration List** link.



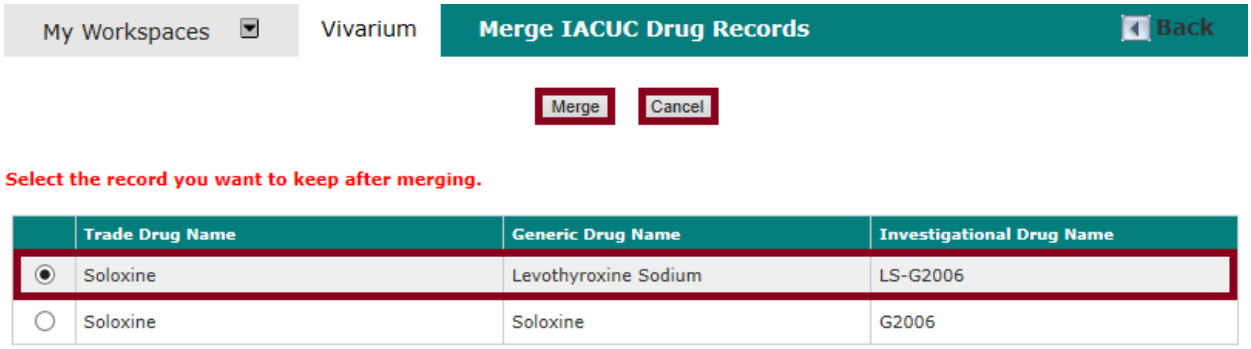
The **Setup IACUC Drug List** page is opened. Click the **Merge IACUC Drug Records** button.



In the example shown above, the second, inaccurate "Soloxine" drug record was created in error. The erroneous "Soloxine" record may have been assigned to one or more studies and must be merged with the valid "Soloxine" record. Click the **Merge Drug Records** button to begin. The **Merge IACUC Drug Records** page opens.

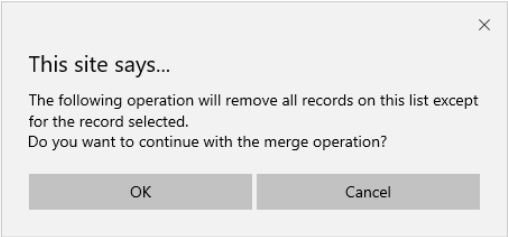


Select the checkboxes at far left for the drug records to be merged and click the **Merge Selected Records** button. A new panel opens with only the selected records listed.

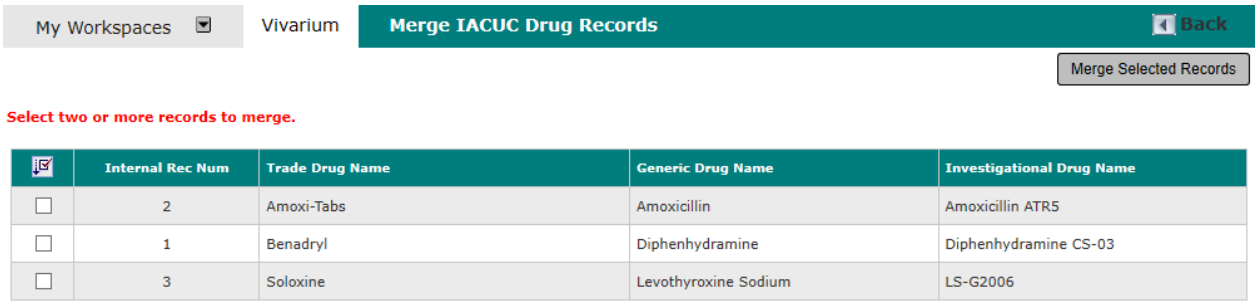


Click the **Cancel** button to close the panel without merging the records.

Note the red instruction text above the table: select the radio button at far left for the record to be KEPT, then click the **Merge** button. A confirmation popup window appears.

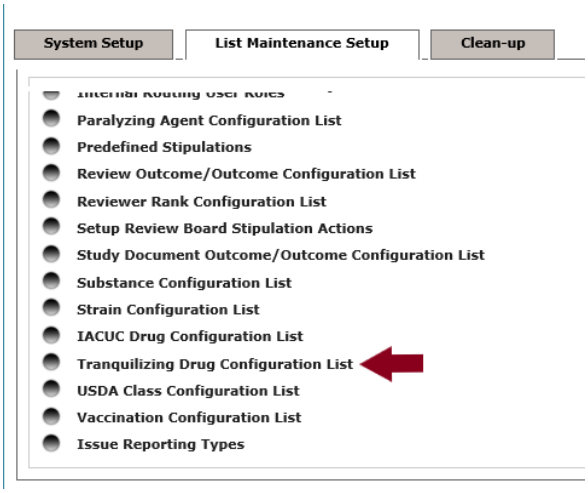


As the popup states, all records on the list will be deleted except for the selected record. Click **Cancel** to close the popup without merging the records. Click **OK** to complete the merge and return to the **Merge IACUC Drug Records** page, where the merge can be confirmed.

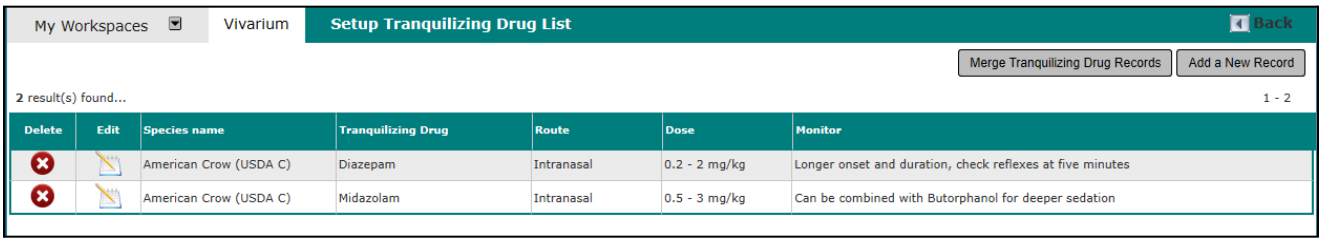


Tranquilizing Drug Configuration List

The **Tranquilizing Drug Configuration List** is where a list of tranquilizing drugs approved by the institution for use in studies is maintained in the iRIS™ system. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Tranquilizing Drug Configuration List** link.



The **Setup Tranquilizing Drug List** page is opened.



Tranquilizing Drug List Implementation – Application Side

The tranquilizing drug list is employed in the following areas on the application side of iRIS™.

IACUC / ARC Study Application — the Tranquilizing Drug List is made available to an IACUC / ARC application via an **Add a New Tranquilizing Drug to the Study** button

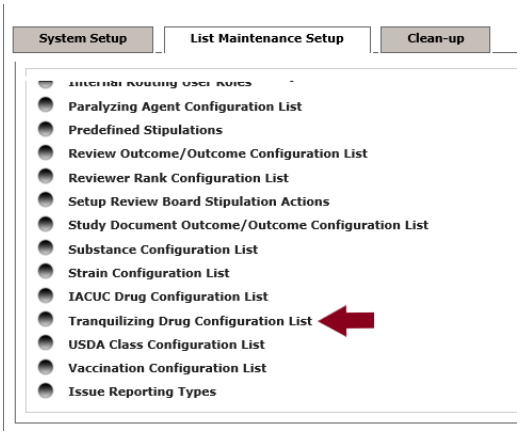
For more information about the IACUC study application, see the iRIS™ IACUC Assistant - IACUC Assistant Manual.

Tranquilizing Drug List Implementation – Board Side

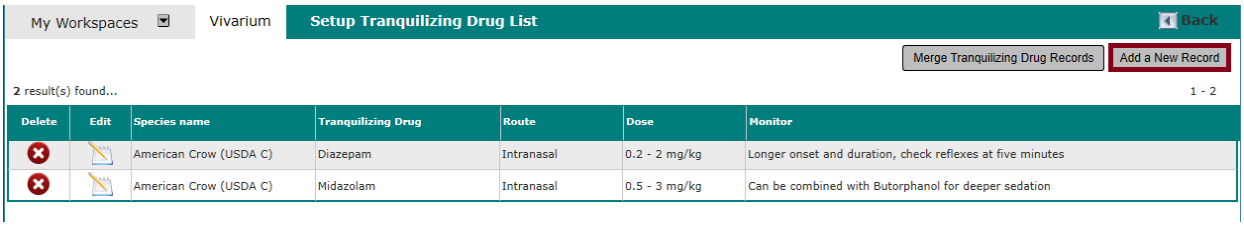
Tranquilizing drugs are added on the application side where required and are not generally subject to direct revision by the board.

Add a New Tranquilizing Drug

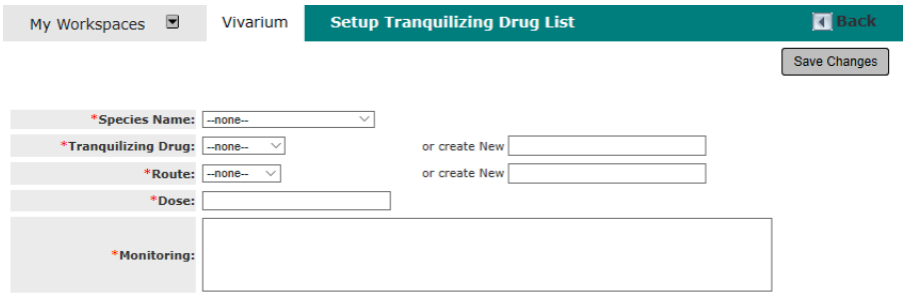
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Tranquilizing Drug Configuration List** link.



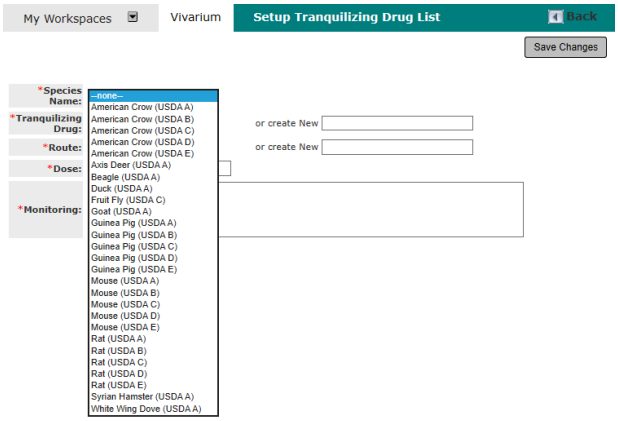
The **Setup Tranquilizing Drug List** page is opened. Click the **Add a New Record** button.



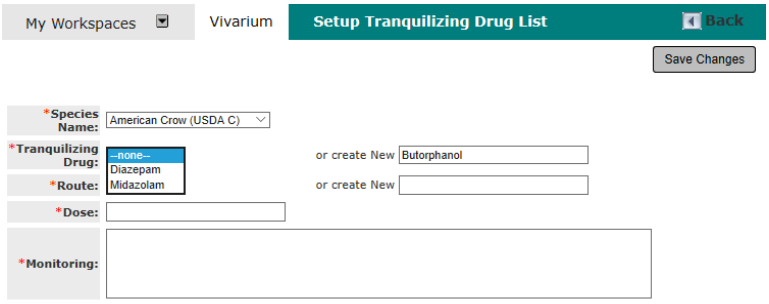
An add panel is opened for creation of the new record.



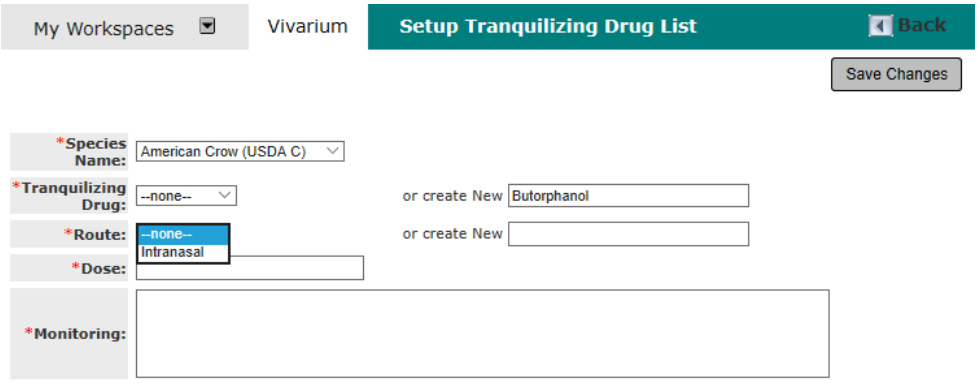
Click on the **Species Name** dropdown list to open it and select the desired species.



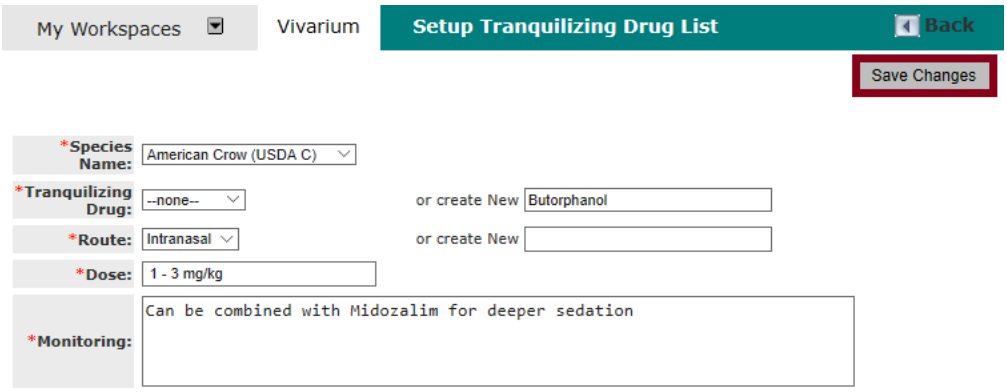
Click on the **Tranquilizing Drug** dropdown list to open it. If the desired item is not in the list, manually enter it in the **or create New** field directly to the right of the dropdown list.



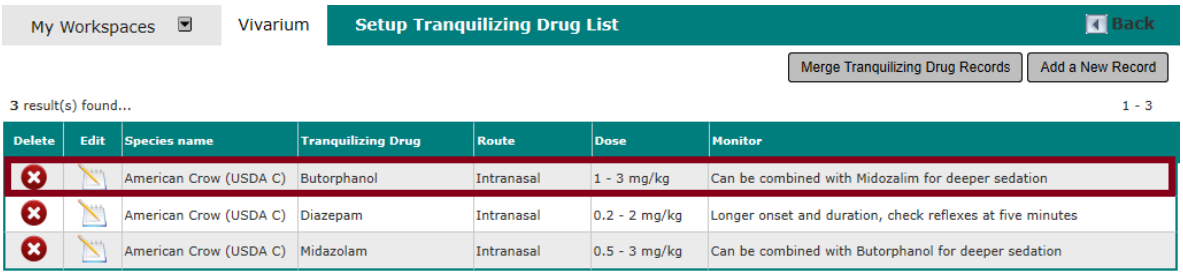
Click on the **Route** dropdown list to open it. If the desired item is not in the list, manually enter it in the **or create New** field directly to the right of the dropdown list.



Enter **Dose** and **Monitoring** details, then click the **Save Changes** button to save the record and close the add panel.

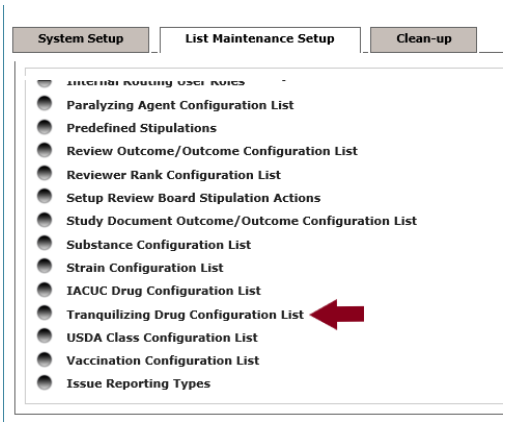


The new record is added on the **Setup Tranquilizing Drug List** page.

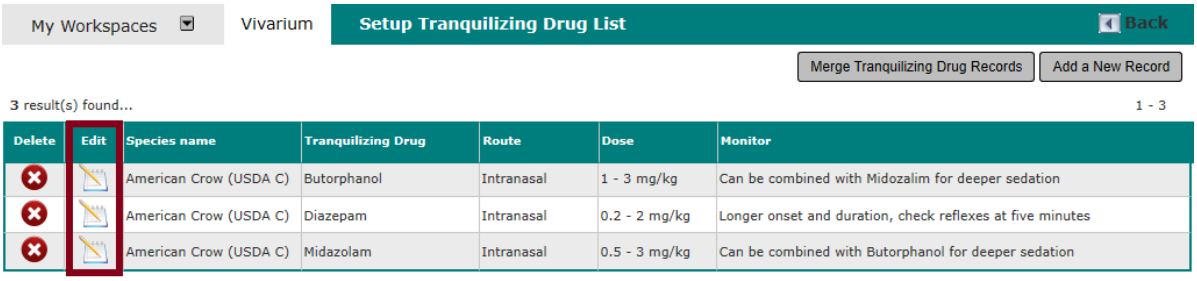


Edit Tranquilizing Drug

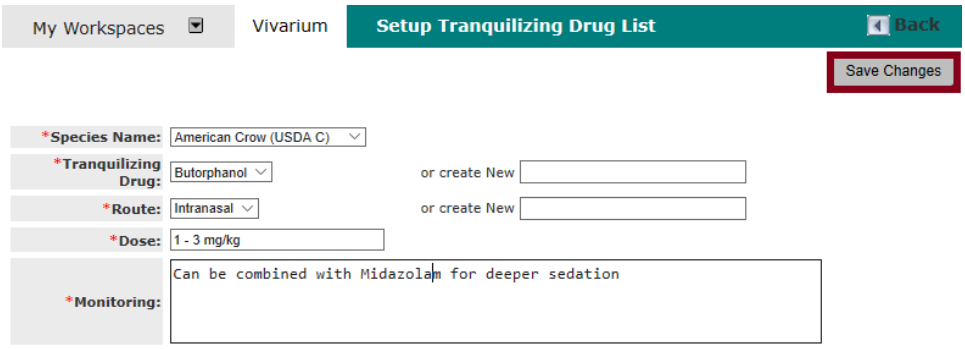
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Tranquilizing Drug Configuration List** link.



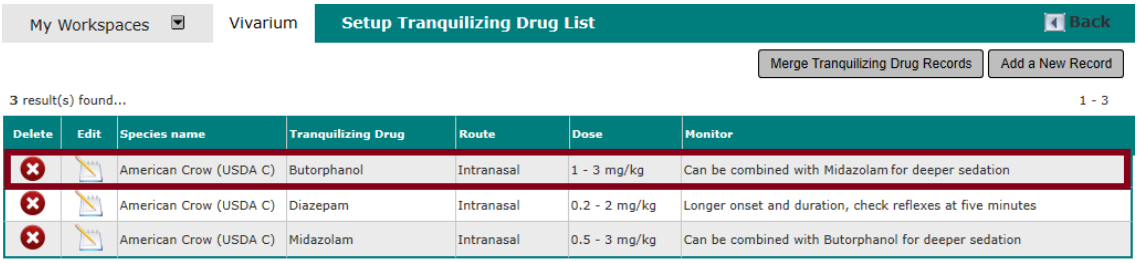
The **Setup Tranquilizing Drug List** page is opened. Click the icon in the **Edit** column for the applicable record.



An edit panel is opened for the selected record.

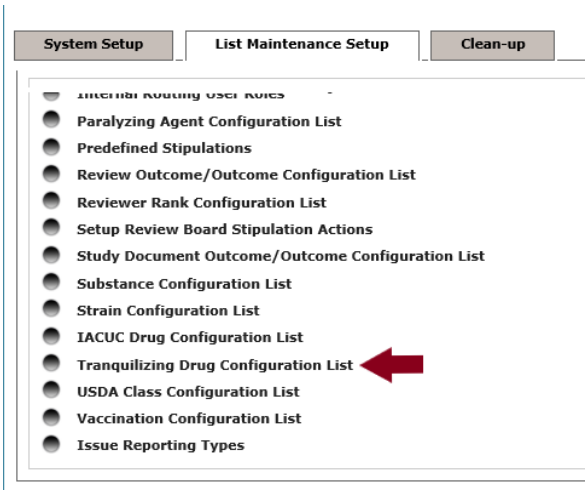


Make desired changes and click the **Save Changes** button to close the edit panel and save the record. The record is revised on the **Setup Tranquilizing Drug List** page.

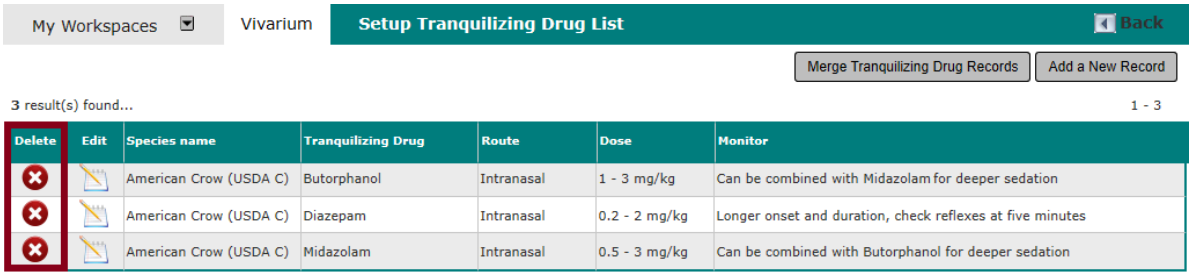


Delete Tranquilizing Drug

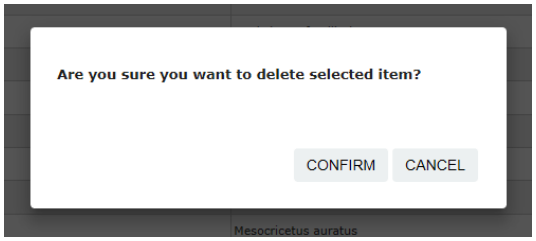
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Tranquilizing Drug Configuration List** link.



The **Setup Tranquilizing Drug List** page is opened. Click the icon in the **Delete** column for the applicable record.



A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record and return to the **Setup Tranquilizing Drug List** page.

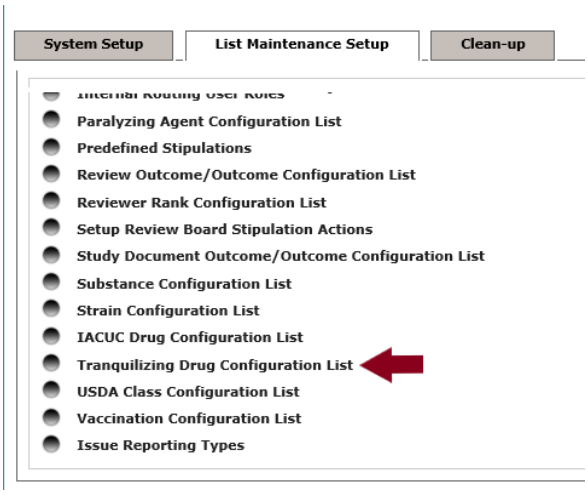
Click **CONFIRM** to complete deletion of the record and return to the **Setup Tranquilizing Drug List** page.

Merge Tranquilizing Drug Records

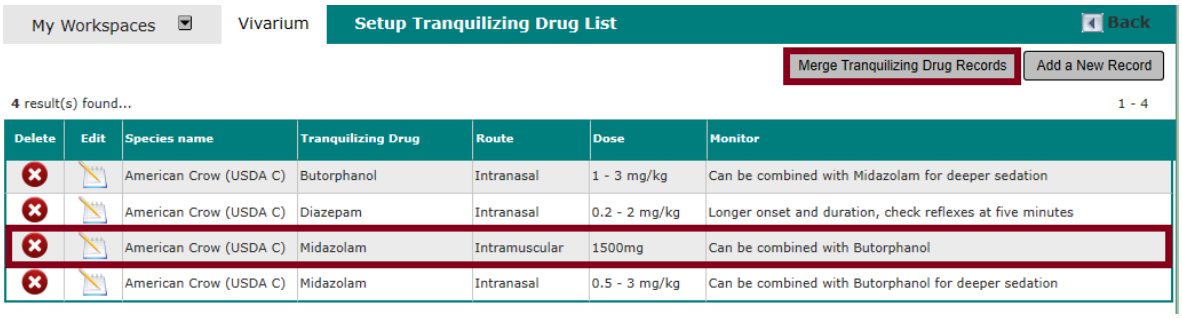
Sometimes a duplicate or erroneous tranquilizing drug record is created and then assigned to one or more study applications before the mistake is caught.

In that situation, the duplicate or erroneous drug record can be merged with a valid drug record. The valid drug record is then substituted for the duplicate/erroneous drug record previously assigned to study applications.

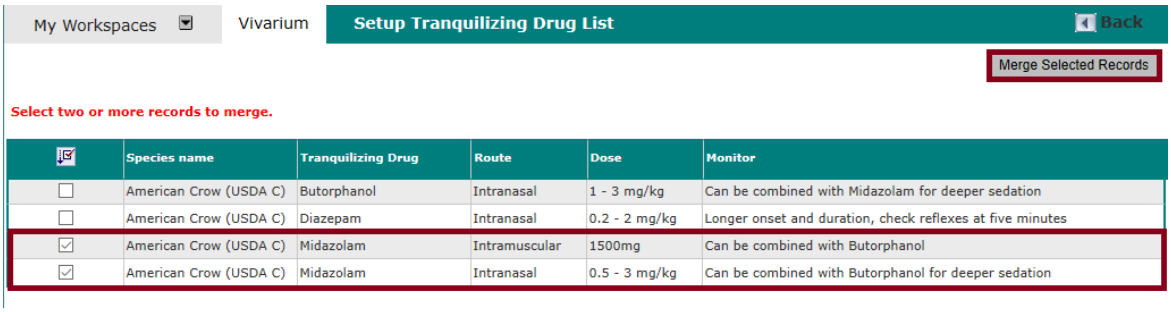
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Tranquilizing Drug Configuration List** link.



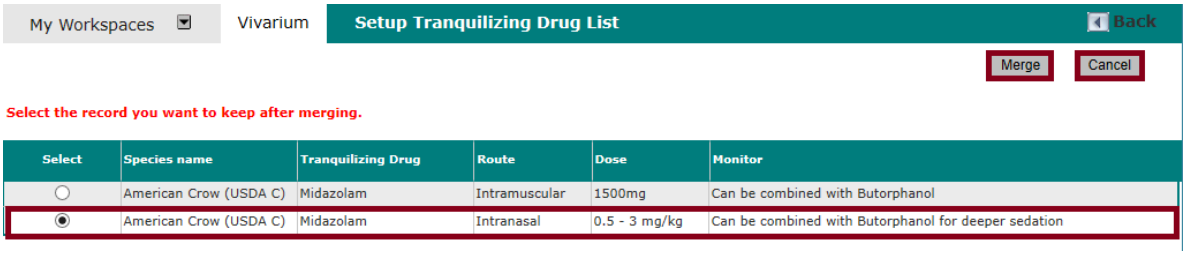
The **Setup Tranquilizing Drug List** page is opened.



In the example shown above, the first “Midazolam” drug record in the list is inaccurate and was created in error. The erroneous Midazolam record may have been assigned to one or more studies and must be merged with the valid “Midazolam” record. Click the **Merge Tranquilizing Drug Records** button to begin. A merge panel opens.

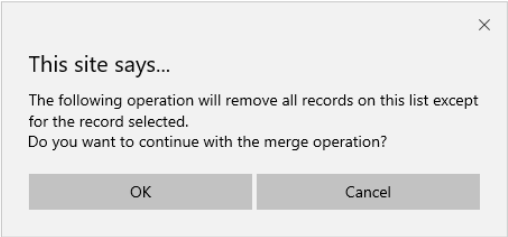


Select the checkboxes at far left for the drug records to be merged and click the **Merge Selected Records** button. A new panel opens with only the selected records listed.

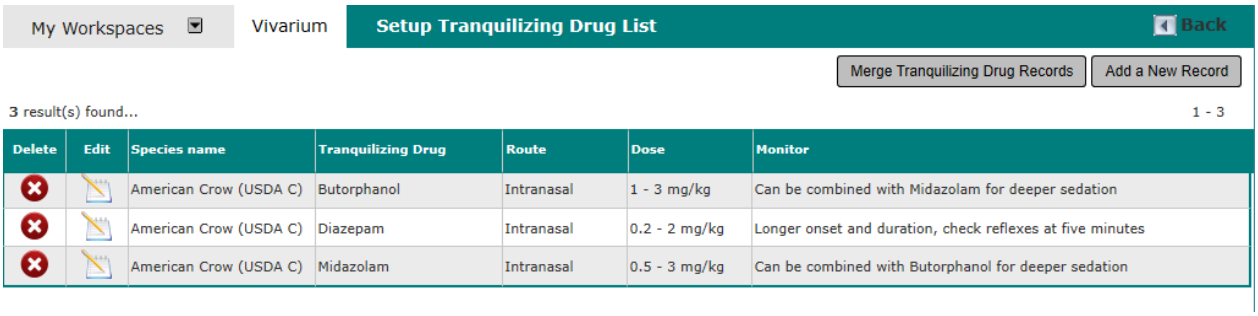


Click the **Cancel** button to close the panel without merging the records.

Note the red instruction text above the table: select the radio button at far left for the record to be KEPT, then click the **Merge** button. A confirmation popup window appears.



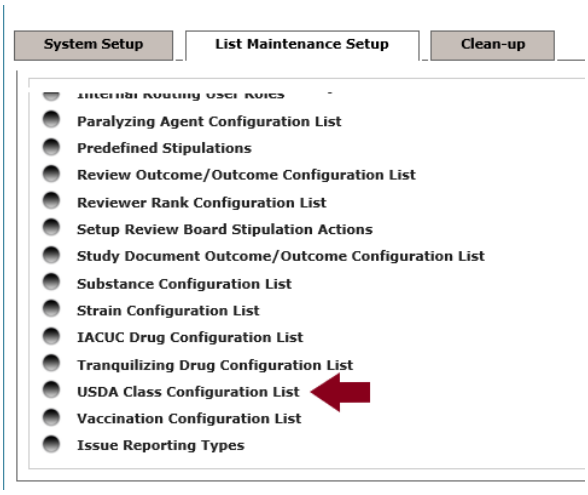
As the popup states, all records on the list will be deleted except for the selected record. Click **Cancel** to close the popup without merging the records. Click **OK** to complete the merge and return to the **Setup Tranquilizing Drug List** page, where the merge can be confirmed.



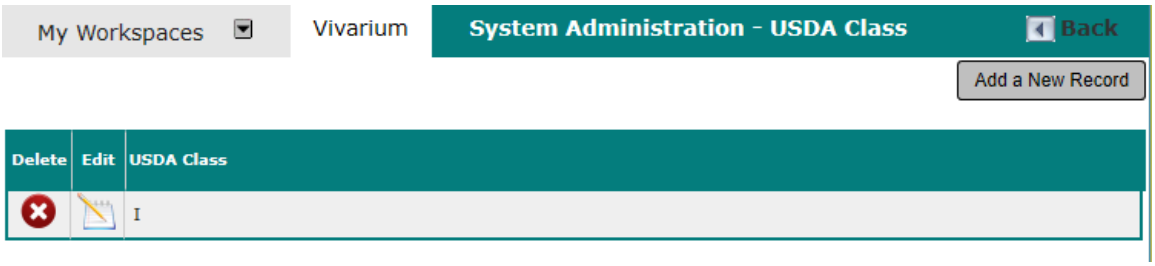
Delete	Edit	Species name	Tranquilizing Drug	Route	Dose	Monitor
		American Crow (USDA C)	Butorphanol	Intranasal	1 - 3 mg/kg	Can be combined with Midazolam for deeper sedation
		American Crow (USDA C)	Diazepam	Intranasal	0.2 - 2 mg/kg	Longer onset and duration, check reflexes at five minutes
		American Crow (USDA C)	Midazolam	Intranasal	0.5 - 3 mg/kg	Can be combined with Butorphanol for deeper sedation

USDA Class Configuration List

The **USDA Class Configuration List** is where a list of USDA animal categories is maintained in the iRIS™ system. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **USDA Class Configuration List** link.



The **USDA Class** page is opened.



Delete	Edit	USDA Class
		I

USDA Animal Categories

For purposes of veterinary licensing, research regulation and safety oversight, the USDA classifies animals into two general categories.

Category I animals — all animals except food and fiber species, horses, birds, farm-raised aquatic animals, all other livestock species, and zoo animals that can transmit exotic animal diseases to livestock; examples include dog, cat, laboratory animal (rat, mouse, gerbil, guinea pig, hamster), non-human primate, rabbit, ferret, mink, gopher, hedgehog, native non-ruminant wildlife, and marine mammal

Category II animals — all animals; examples include food and fiber animal species (cow, pig, sheep, goat, all ruminant), horse (mule, ass, pony, zebra), all bird species and poultry, farm-raised aquatic animal species, livestock species (bison, captive cervid, llama, alpaca, antelope, other hoofed animal), and zoo animals that can transmit exotic animal diseases to livestock

Note that Category I is a subset of Category II.

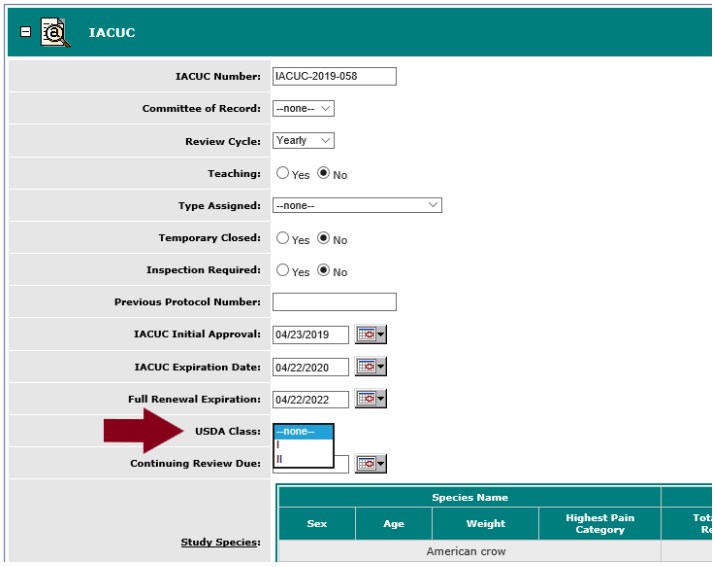
For more information about implementation of USDA requirements in institutional research, visit the APHIS Animal Welfare portal at https://www.aphis.usda.gov/aphis/ourfocus/animalwelfare.

The iRIS™ system does not enforce the USDA's category designations in the USDA Class Configuration List, nor limit the list to the USDA's two current categories. Some institutions may choose to use this list for tracking subject animal categories or classifications of their own.

USDA Class List Implementation – Application Side

The USDA class list is employed in the following areas on the application side of iRIS™.

Study Profile — the USDA Class list is employed in the **IACUC** section of the Study Profile, accessed via IACUC > Find a Study > [study opened] > Study Management tab > Study Summary/Profile link

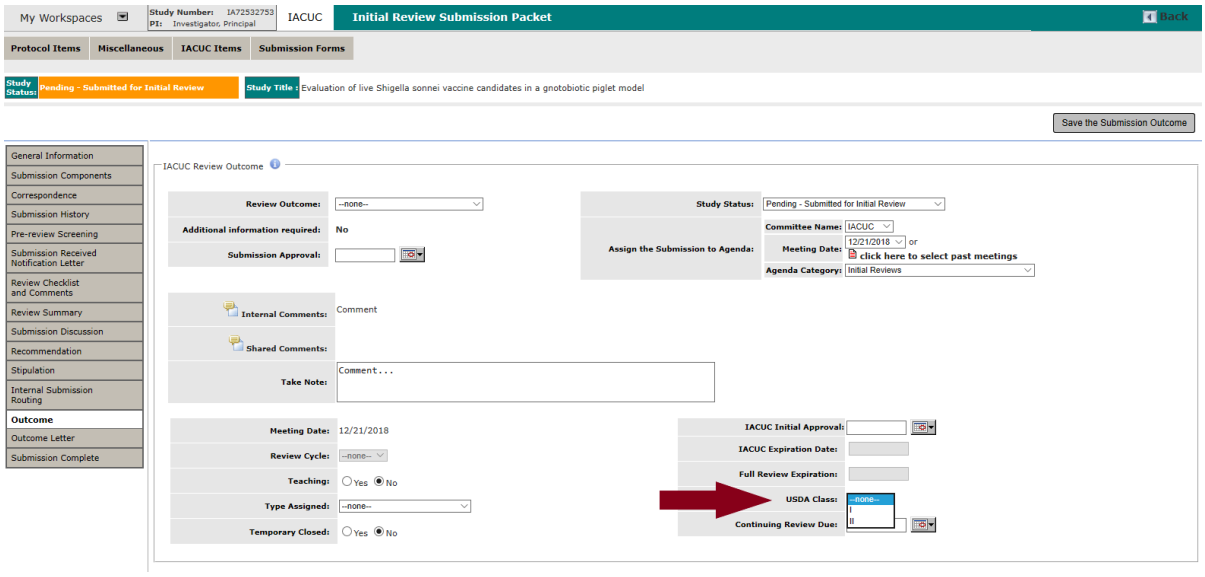


For more information about the IACUC study application, see the iRIS™ IACUC Assistant - IACUC Assistant Manual.

USDA Class List Implementation – Board Side

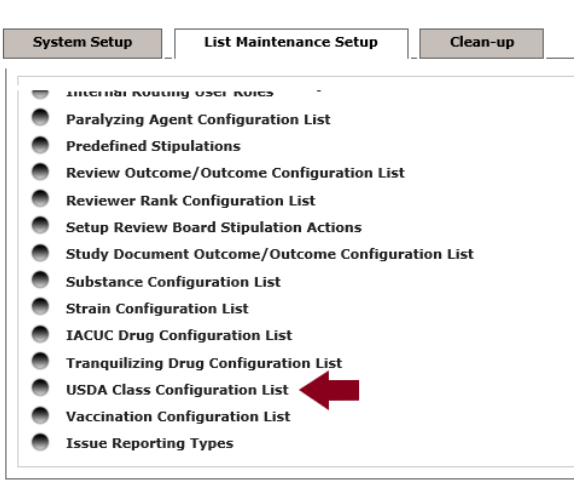
The USDA class list is employed in the following areas on the review board / system setup side of iRIS™.

IACUC Review Submission Packet — the USDA Class list is employed in the Outcome tab of the IACUC Review Outcome section of the IACUC Review Submission Packet

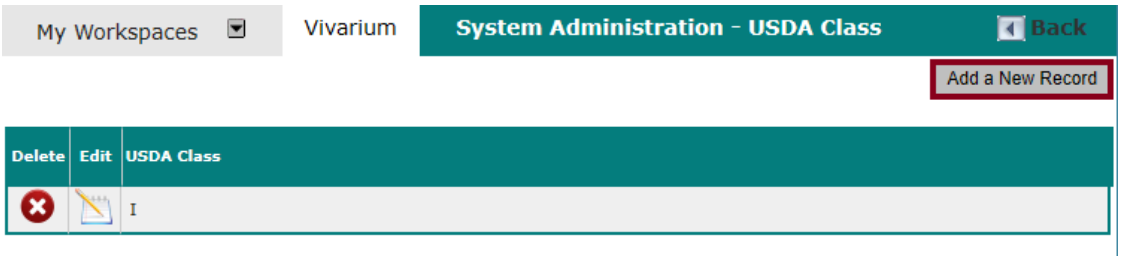


Add USDA Class

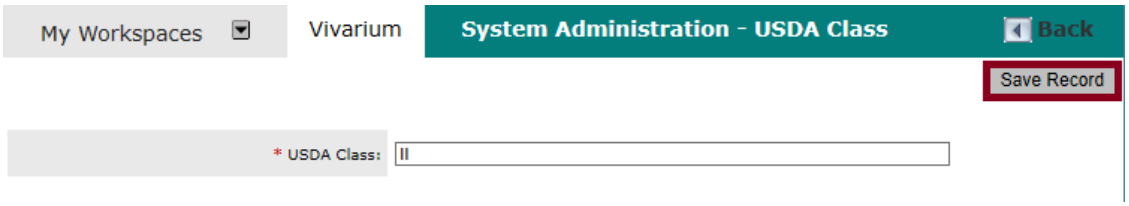
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **USDA Class Configuration List** link.



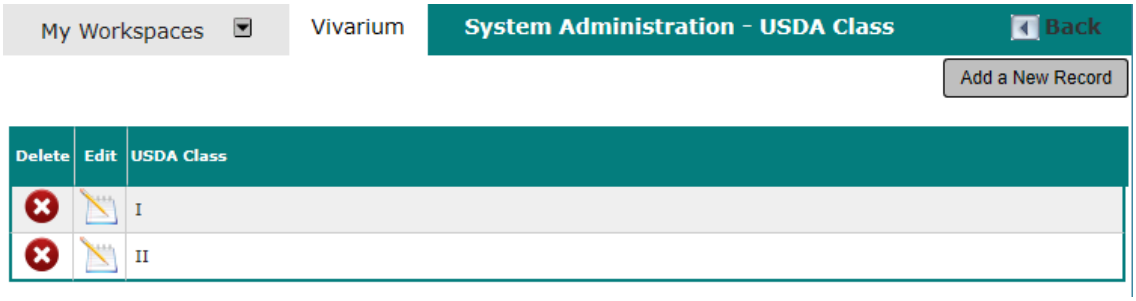
The **USDA Class** page is opened. Click the **Add a New Record** button.



An add panel is opened. Enter the **USDA Class** and click the **Save Record** button.

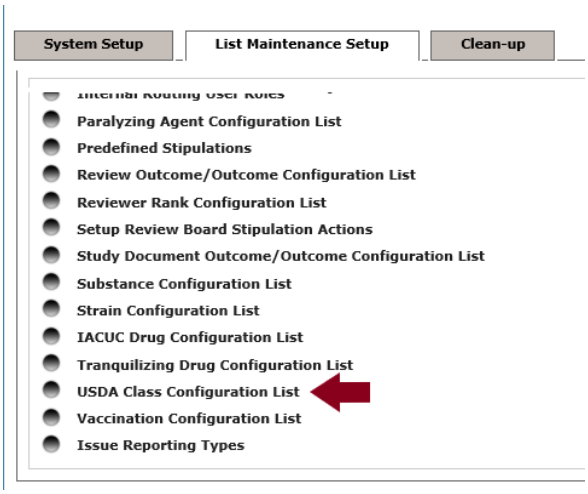


The record is added to the **USDA Class List** page.

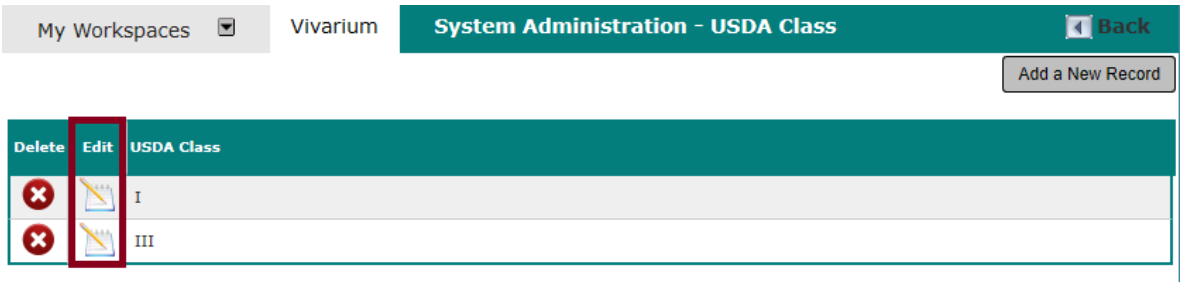


Edit USDA Class

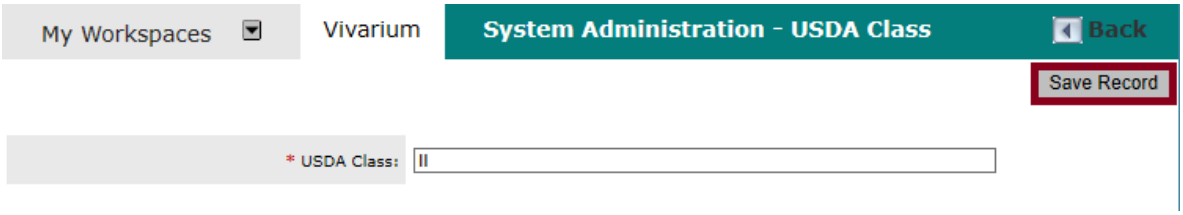
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **USDA Class Configuration List** link.



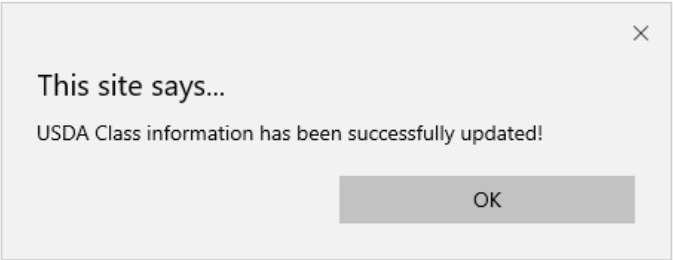
The **USDA Class** page is opened. Click the icon in the **Edit** column for the applicable record.



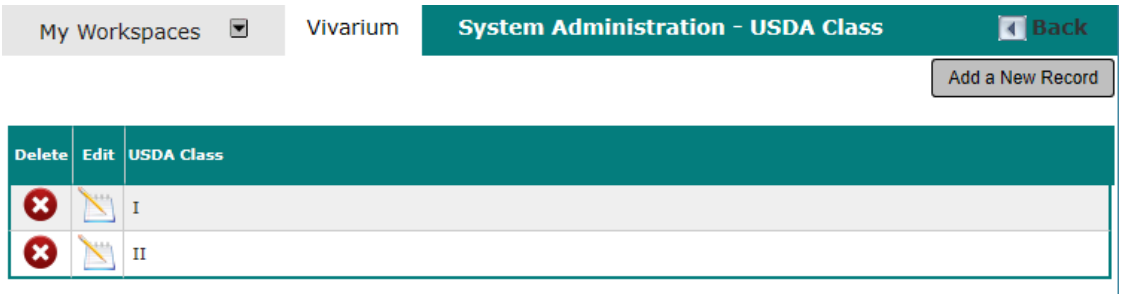
The record is opened in an edit panel. In this example the second record is being corrected.



Make desired changes and click the **Save Record** button. A confirmation popup dialog box appears.

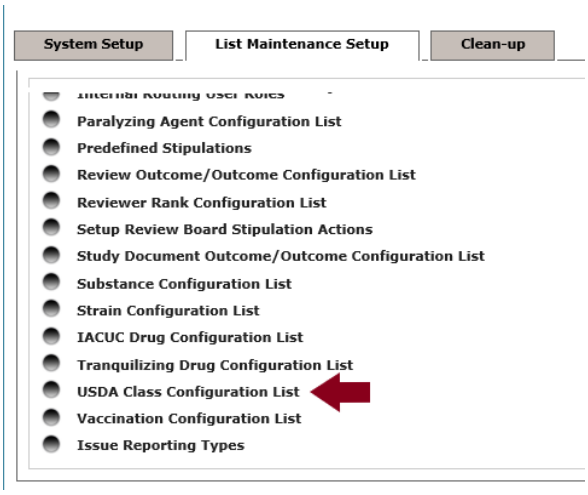


Click the **OK** button to close the popup. The record is revised on the **USDA Class** page.

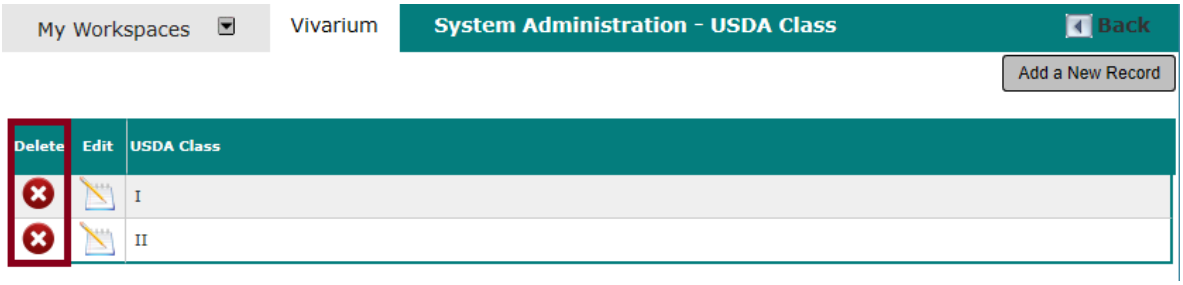


Delete USDA Class

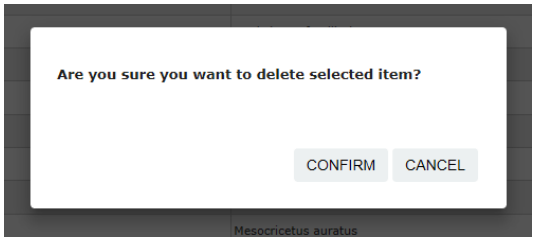
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **USDA Class Configuration List** link.



The **USDA Class** page is opened. Click the icon in the **Delete** column for the applicable record.



A confirmation popup window displays.

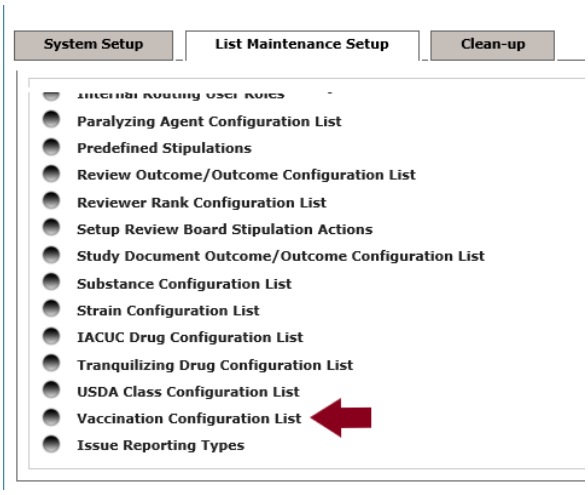


Click **CANCEL** to close the popup without deleting the record and return to the **USDA Class** page.

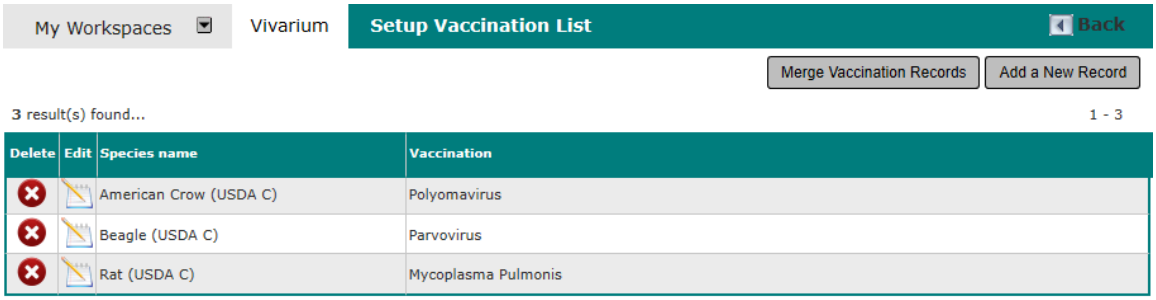
Click **CONFIRM** to complete deletion of the record and return to the **USDA Class** page.

Vaccination Configuration List

The **Vaccination Configuration List** is where a list of vaccines approved by the institution for use in studies is maintained in the iRIS™ system. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Vaccination Configuration List** link.



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



Vaccination List Implementation – Application Side

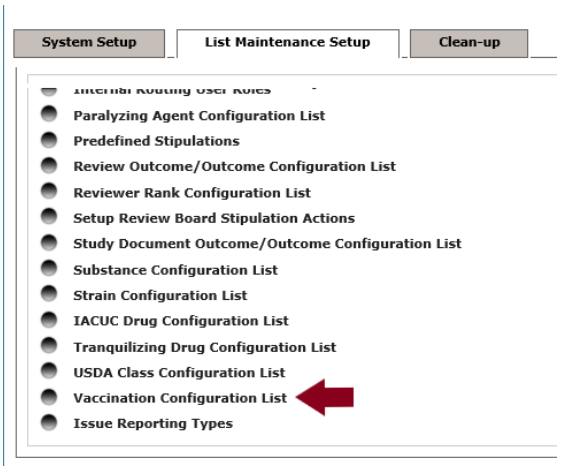
Where this field is in use by the institution, it appears in the study application form.

Vaccination List Implementation – Board Side

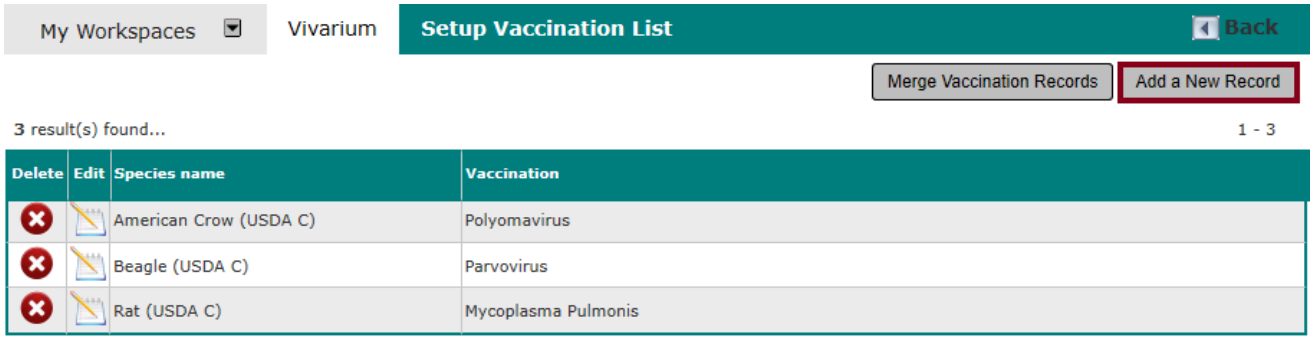
Vaccinations are added on the application side where required and are not generally subject to direct revision by the board.

Add Vaccination

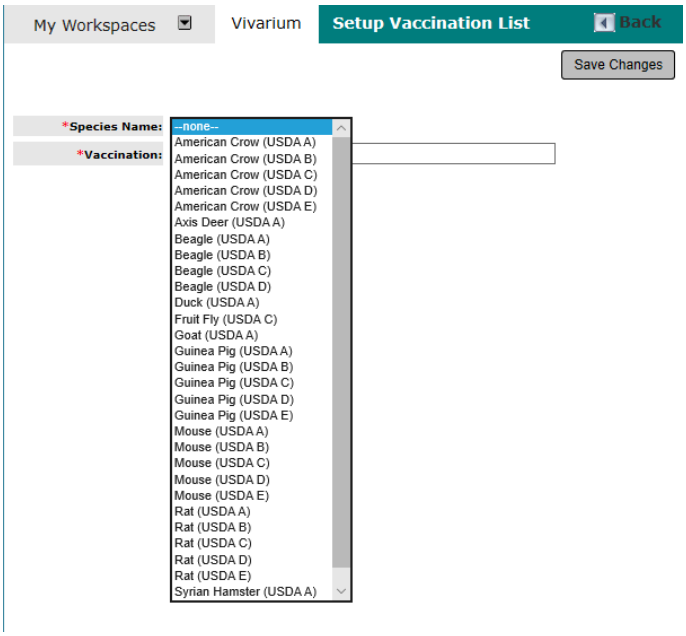
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Vaccination Configuration List** link.



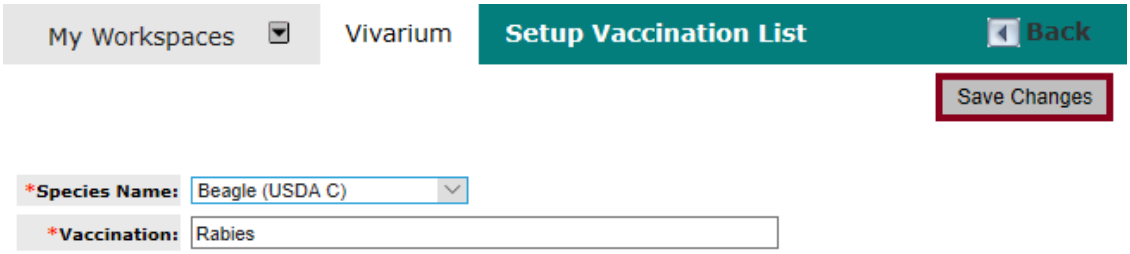
The **Setup Vaccination List** page is opened. Click the **Add a New Record** button.



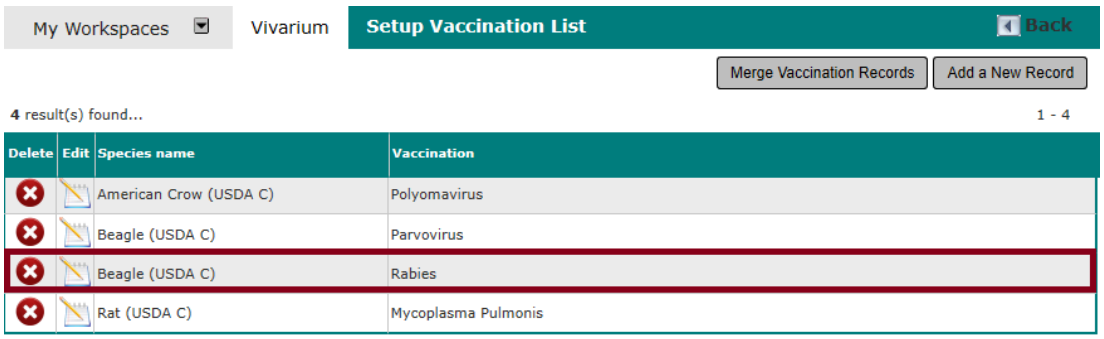
An add panel is opened for creation for the new record.



Click on the **Species Name** dropdown list to open it and select the desired species, then enter the **Vaccination** name and click the **Save Changes** button.

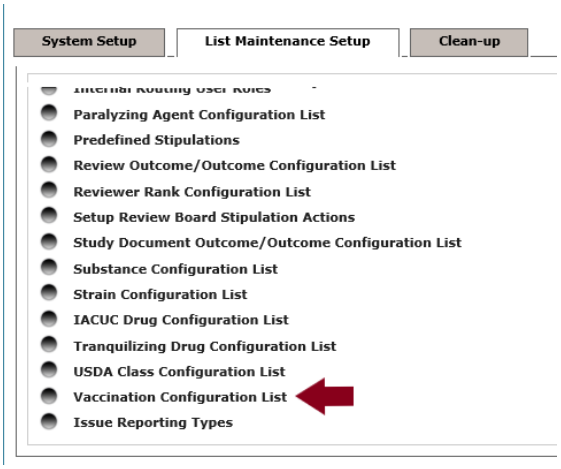


The new record is added on the **Setup Vaccination List** page.

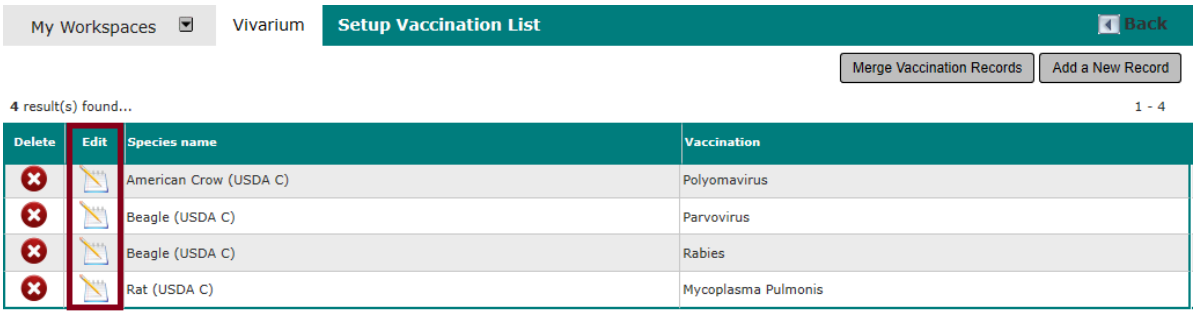


Edit Vaccination

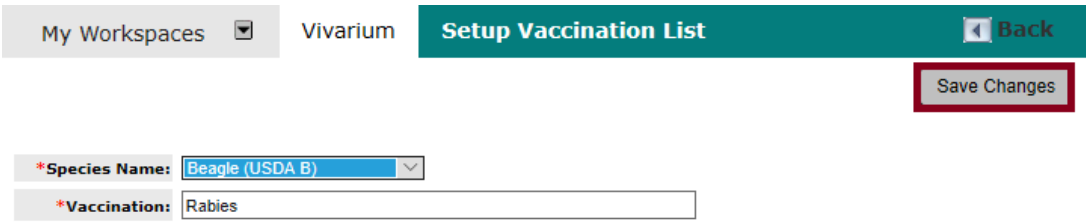
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Vaccination Configuration List** link.



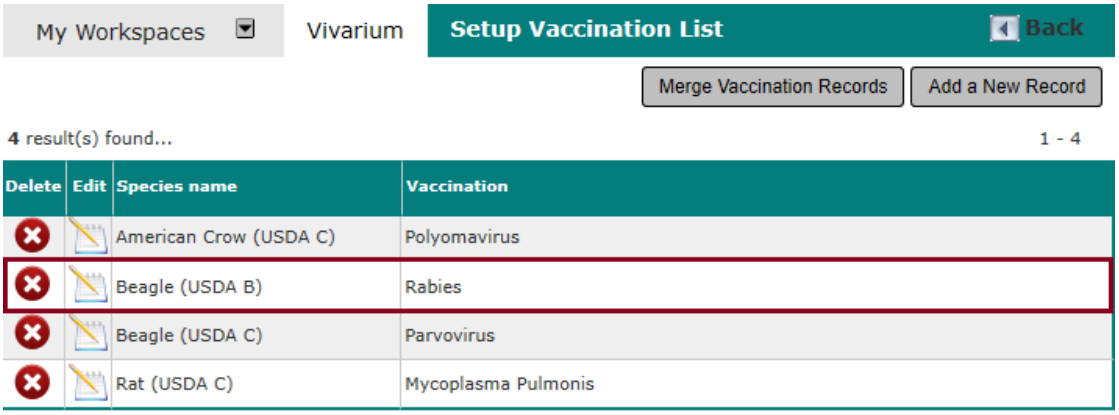
The **Setup Vaccination List** page is opened. Click the icon in the **Edit** column for the applicable record.



The record is opened in an edit panel. Make desired changes and click the **Save Changes** button.

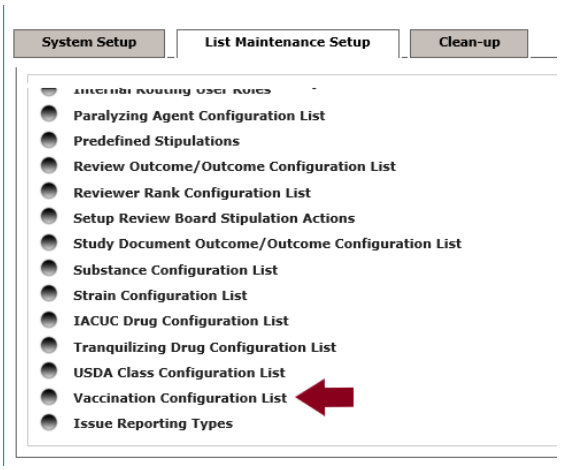


The record is revised on the **Setup Vaccination List** page.

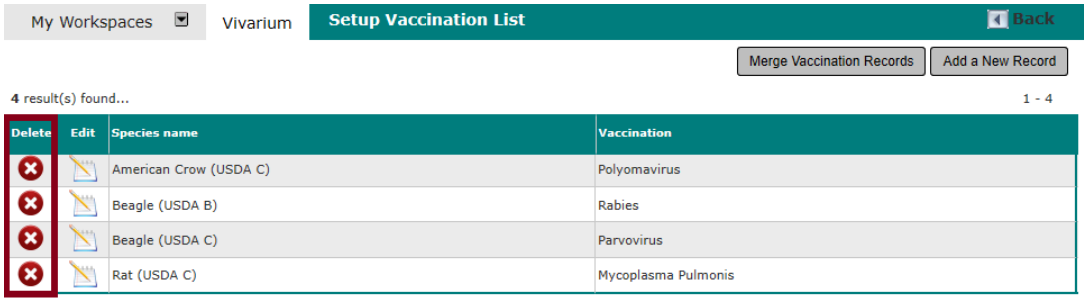


Delete Vaccination

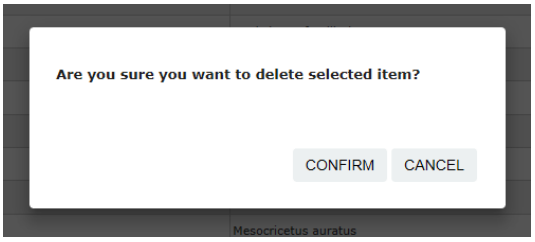
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Vaccination Configuration List** link.



The **Setup Vaccination List** page is opened. Click the icon in the **Delete** column for the applicable record.



A confirmation popup window displays.



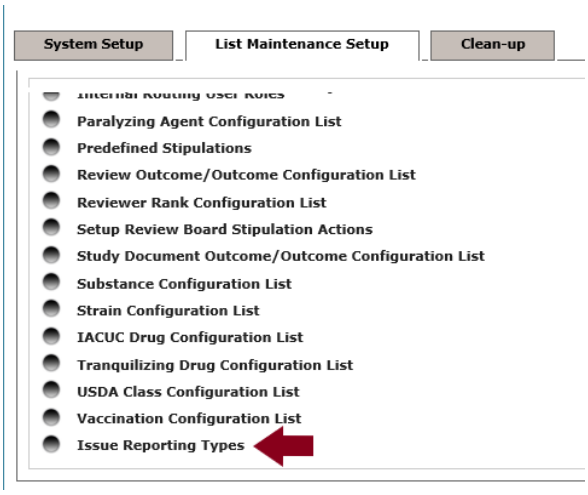
Click **CANCEL** to close the popup without deleting the record and return to the **Setup Vaccination List** page.

Click **CONFIRM** to complete deletion of the record and return to the **Setup Vaccination List** page.

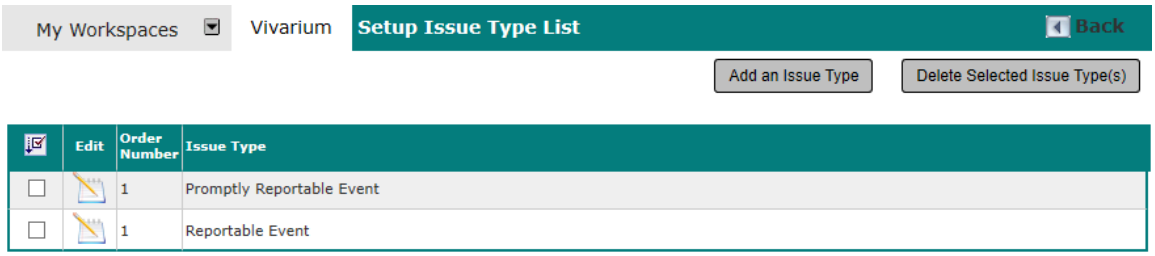
Issue Reporting Types

Institutions involved in IRB or IACUC research activity must report any issues that arise and have the potential to impact on any aspect of research activities. Each institution has its own internal policies for issue reporting, categorization, management and resolution.

The **Issue Reporting Types** list is where a list of issue reporting types can be maintained by institutions in the iRIS™ system. To access the list, navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Issue Reporting Types** link.



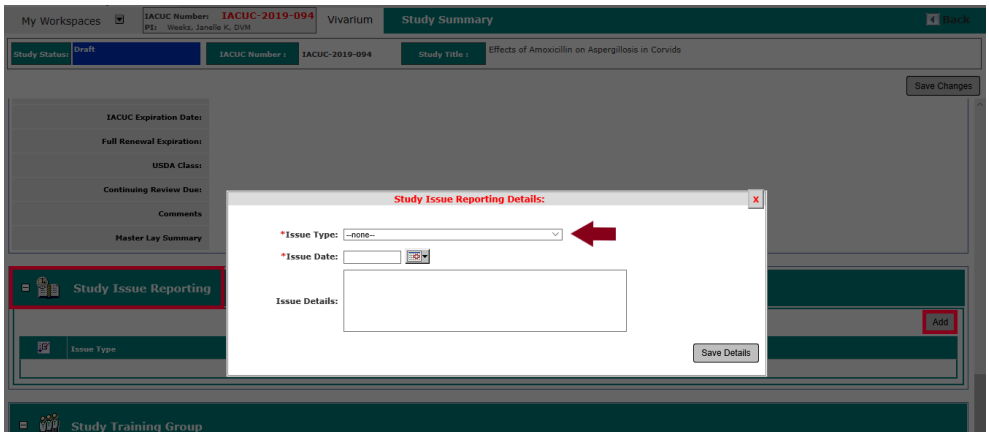
The **Setup Issue Type List** page is opened.



Issue Type Implementation – Application Side

The issue type list is employed in the following areas on the application side of iRIS™.

Issue reporting functionality on the application side is accessed via IACUC/Animal Resource Center > Find a Study > [study opened] > Study Management tab > Study Summary/Profile link.



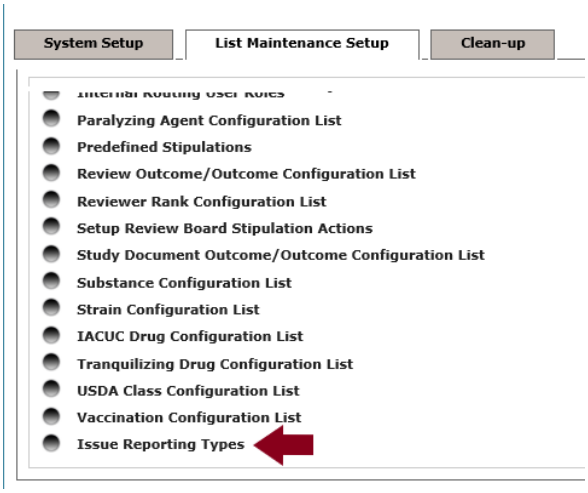
For more information about the IACUC study application, see the iRIS™ IACUC Assistant - IACUC Assistant Manual.

Issue Type Implementation – Board Side

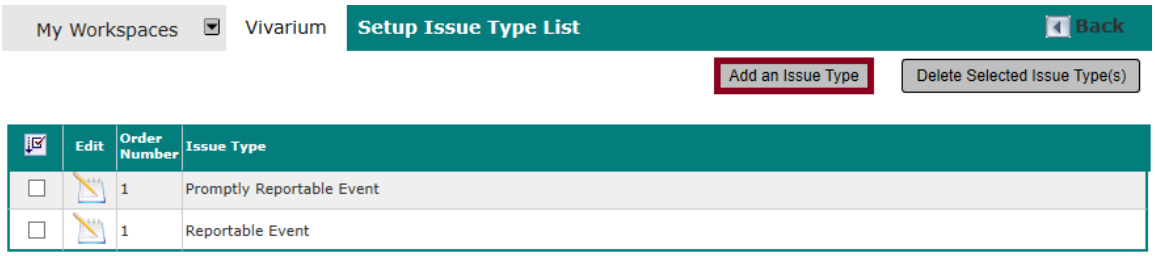
Issues are reported on the application/study side at the time they occur. This list is not applicable to the board side of processing.

Add Issue Type

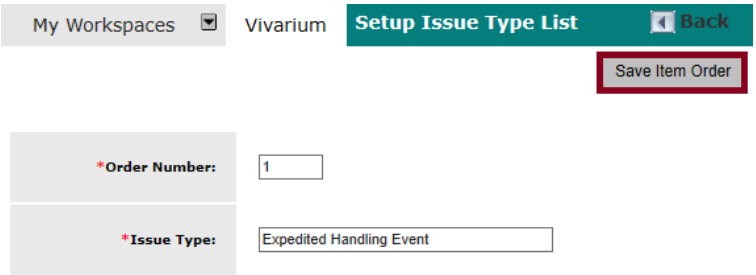
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Issue Reporting Types** link.



The **Setup Issue Type List** page is opened. Click the **Add an Issue Type** button.



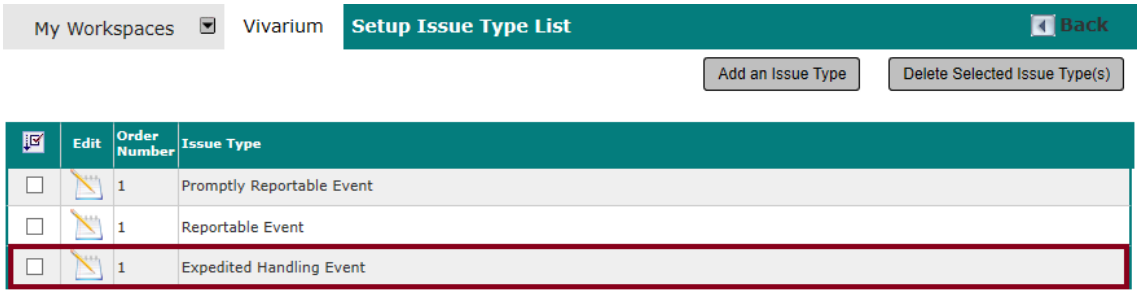
An add panel is opened for creation of the new record.



Enter an **Order Number** and enter the desired designation in the **Issue Type** field, then click the **Save Item Order** button to save the record and close the add panel.

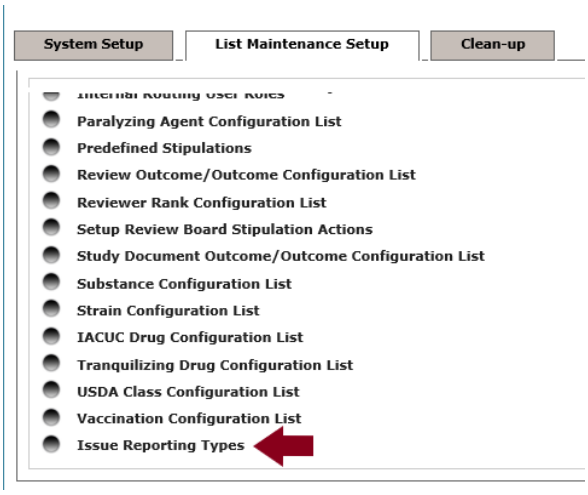
*Note that the **Order Number** field is generally used to indicate the priority level of the **Issue Type**, according to the institution's internal policies.*

The record is added to the **Setup Issue Type List**.

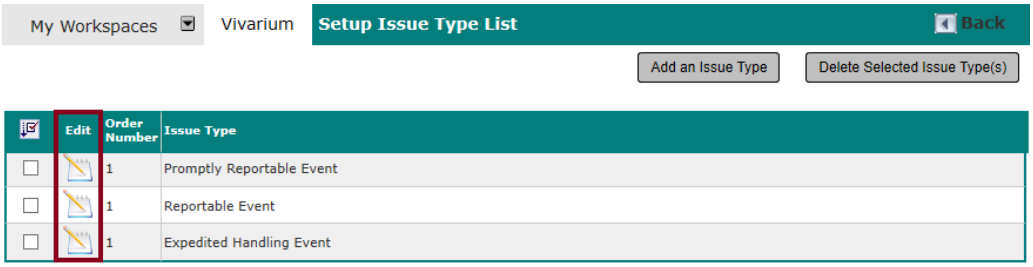


Edit Issue Type

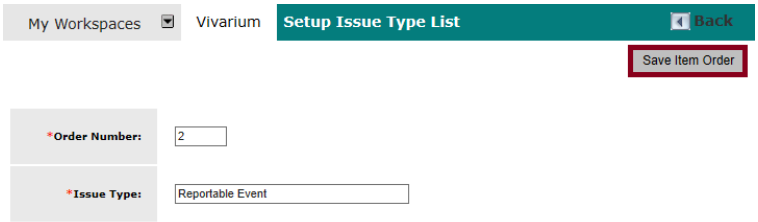
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Issue Reporting Types** link.



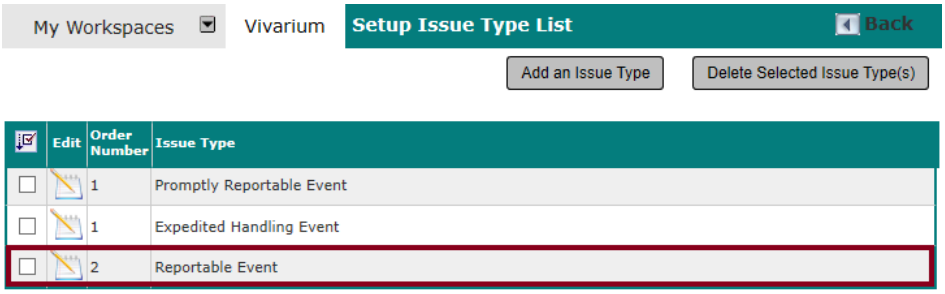
The **Setup Issue Type List** page is opened. Click the icon in the Edit column for the applicable item.



The record is opened in an edit panel.

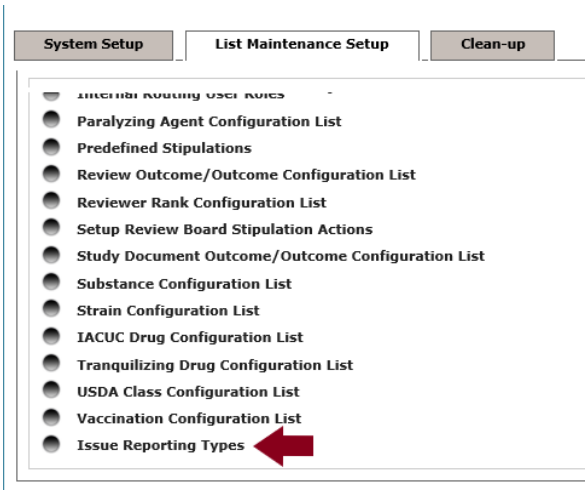


Make desired changes and click the **Save Item Order** button to save the record and close the edit panel. The record is revised on the **Setup Issue Type List**.

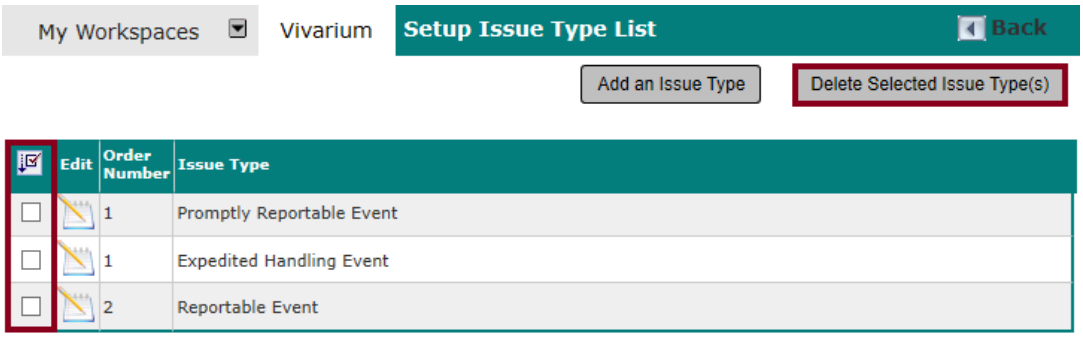


Delete Issue Type

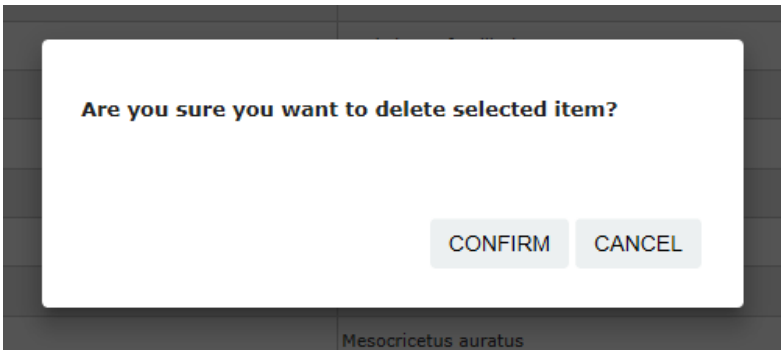
Navigate to Animal Resource Center > Review Board Administration > List Maintenance Setup tab and click the **Issue Reporting Types** link.



The **Setup Issue Type List** page is opened. Select the checkbox(es) in the far-left column for the record(s) to be deleted and click the **Delete Selected Issue Type(s)** button.



A confirmation popup window displays.



Click **CANCEL** to close the popup without deleting the record and return to the **Setup Issue Type List** page.

Click **CONFIRM** to complete deletion of the record and return to the **Setup Issue Type List** page. The record is deleted from the list on the **Setup Issue Type List** page.

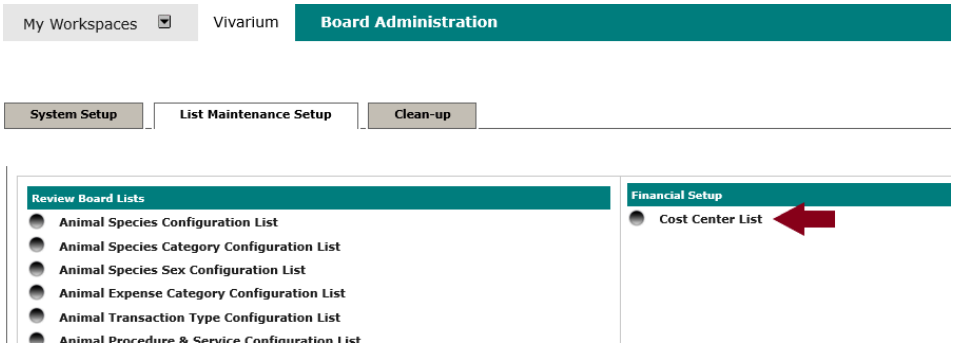
Cost Center List / Account List

The **Define Cost Centers** page is where a list of study cost centers is maintained in the iRIS™ system.

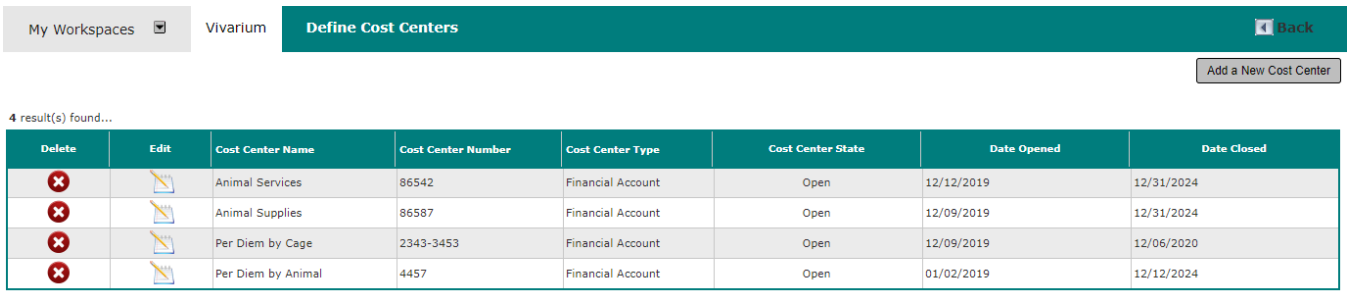
Note that this feature is only available if the system.use_arc_cost_center_user_access property under System Administration > System Configuration > Animal Resource Center section is set to "Yes". Also note that where that property is set to "Yes", the applicable menu link is only visible to users with appropriate access rights.

To access the list, navigate to Animal Resource Center > Review Board Administration > **List Maintenance Setup** tab and click the **Cost Center List** link in the **Financial Setup** section.

Note that the name of this configuration list can be customized by the institution and may appear as "Account List".



The **Define Cost Centers** page is opened.



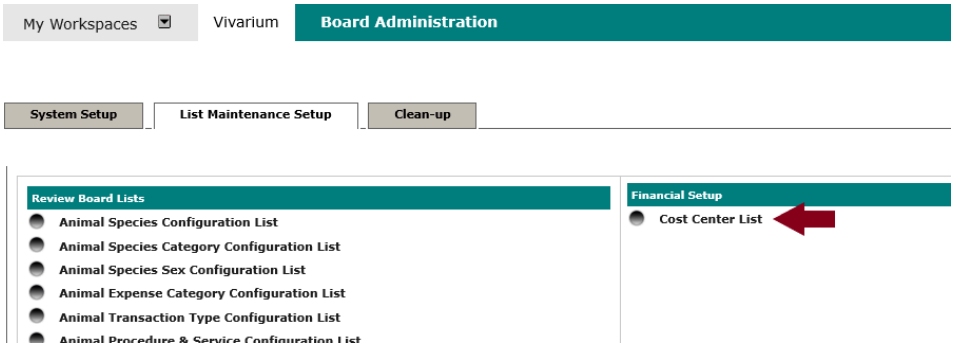
Delete	Edit	Cost Center Name	Cost Center Number	Cost Center Type	Cost Center State	Date Opened	Date Closed
		Animal Services	86542	Financial Account	Open	12/12/2019	12/31/2024
		Animal Supplies	86587	Financial Account	Open	12/09/2019	12/31/2024
		Per Diem by Cage	2343-3453	Financial Account	Open	12/09/2019	12/06/2020
		Per Diem by Animal	4457	Financial Account	Open	01/02/2019	12/12/2024

Cost center records can be created, edited or deleted from this page.

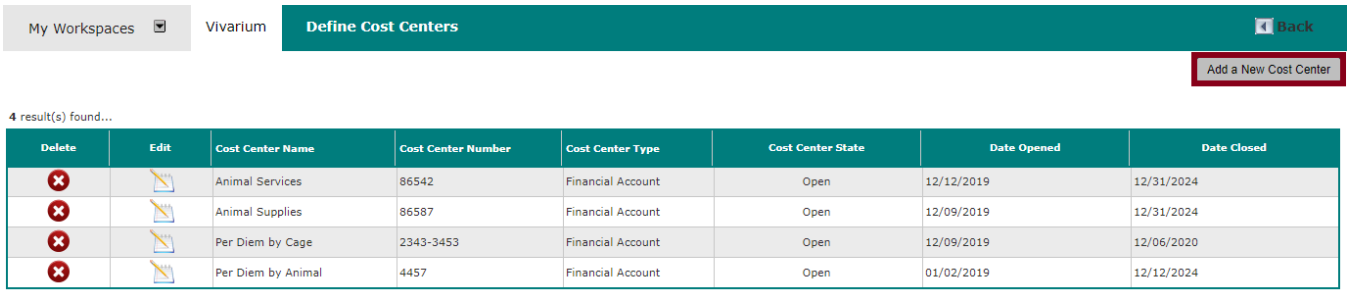
Add Cost Center

Navigate to Animal Resource Center > Review Board Administration > **List Maintenance Setup** tab and click the **Cost Center List** link in the **Financial Setup** section.

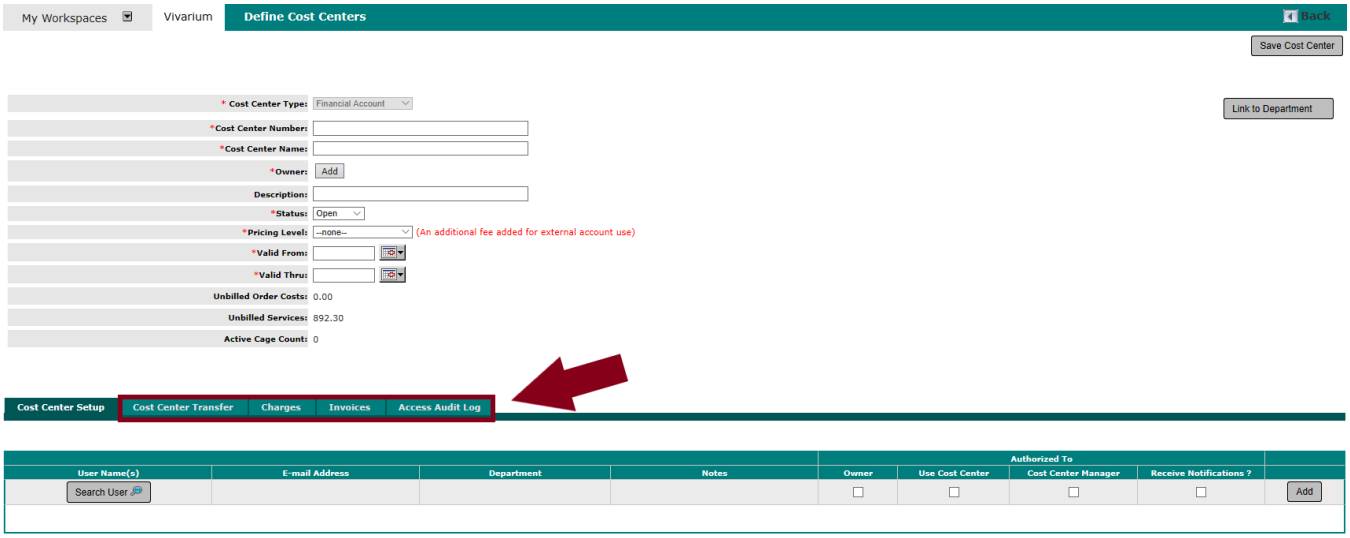
Note that the name of this configuration list can be customized for the institution and may appear as "Account List".



The **Define Cost Centers** page is opened.



Click the **Add a New Cost Center** button. An add panel opens, as shown below.



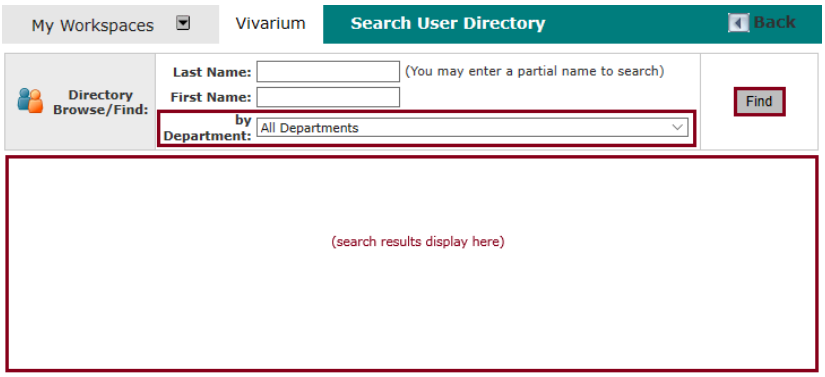
Notice that only the **Cost Center Setup** tab is unlocked on this panel when creating a new cost center. The other tabs, indicated by a red arrow and box in the screenshot above, are only used when working with existing cost centers.

Complete the add panel fields as described below.

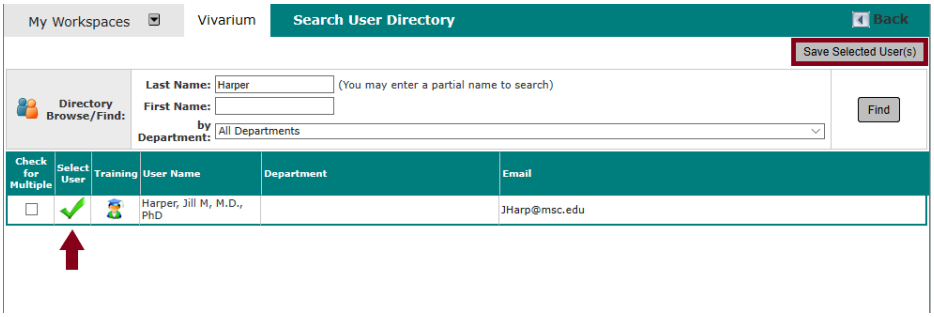
Cost Center Number — text entry field; enter the desired cost center number

Cost Center Name — text entry field; enter the desired cost center name

Owner — click the **Add** button to open the **Search User Directory** page for user lookup and selection

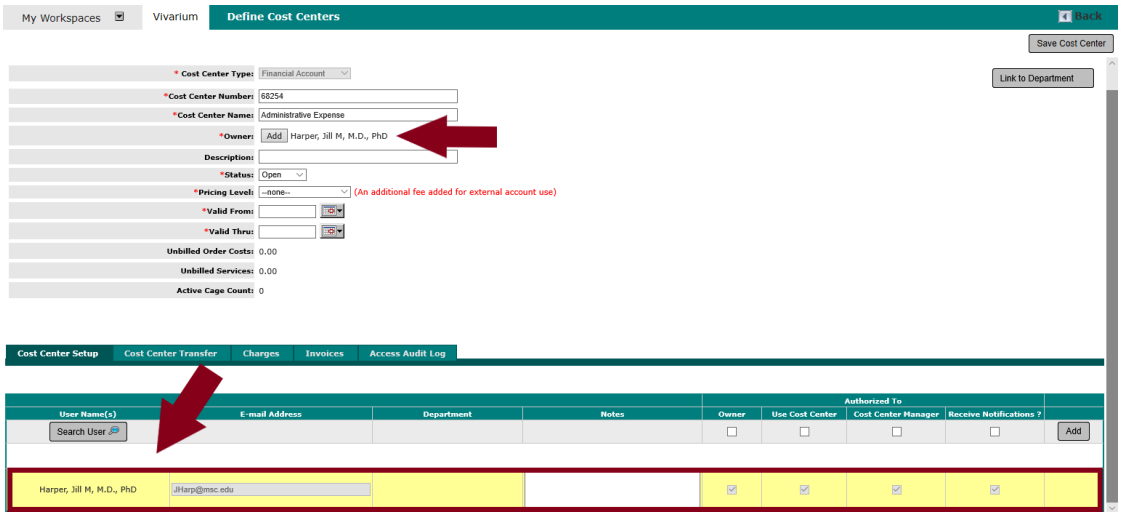


As shown in the screenshot above, the user directory can be searched by full or partial **Last Name** or **First Name**, by **Department**, or by any combination of the three. Enter desired search criteria in the top section of the page and click the **Find** button. Search results display in the lower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



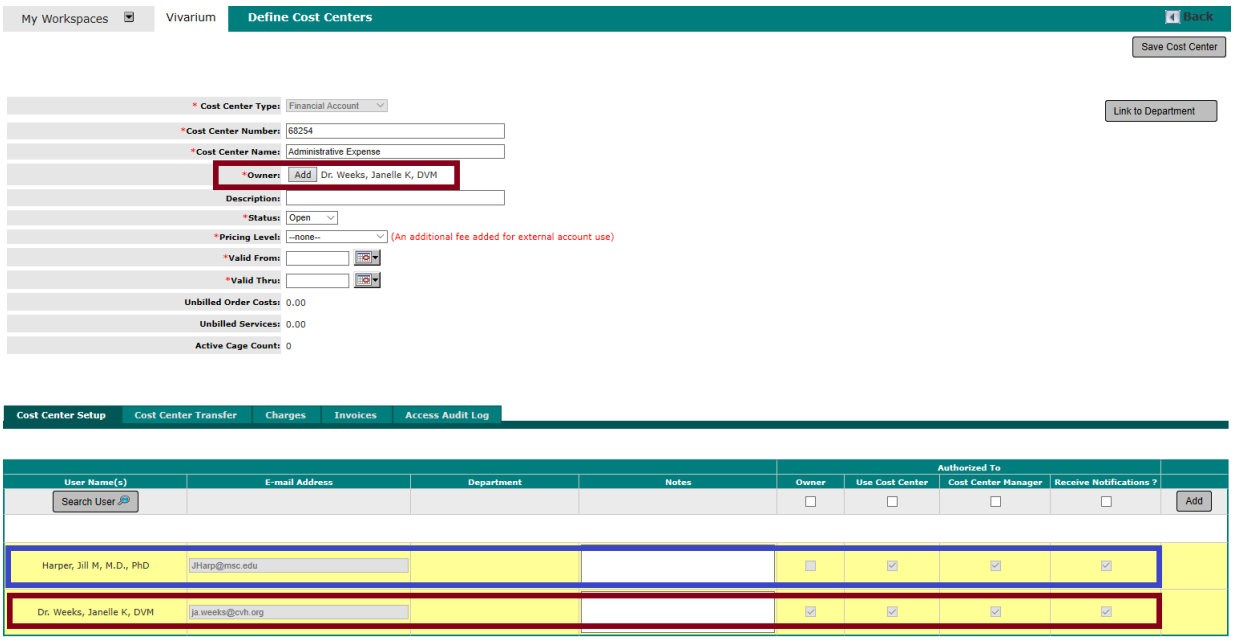
Click the checkmark icon in the **Select User** column to assign the applicable user as the owner of the new cost center. Note that only one user can be assigned as cost center owner, though multiple users can have various access rights to a cost center.

The user is added as cost center **Owner**, as shown below. Notice that the selected user is automatically assigned full rights to all cost center functions in the **Authorized To** section at the bottom of the cost center add panel.



The **Add** button remains for the **Owner** field, indicating that a different user can be substituted for the one originally selected as owner. Note that any user added in this manner is added to, *and remains in*, the list of users at the bottom of the cost center add panel.

In the example below the **Add** button was clicked again and a different user was assigned as cost center **Owner** (red boxes). Notice that the user previously assigned as owner remains in the list of users assigned to the cost center, but the **Owner** box is no longer selected for that user in the **Authorized To** section at the bottom of the cost center add panel (blue box). Also notice that all **Authorized To** section select boxes at the bottom of the panel are read only.



Because it is not possible to de-select any items in the **Authorized To** section, if the new cost center is saved with both users in the list at the bottom of the page as shown in the screenshot above, both users will have access to the new cost center with assigned rights as shown above.

If user access or rights changes are required after the new cost center is created, those changes must be made via the Edit Cost Center function (see the Edit Cost Center subsection of this manual). Add panel fields in the upper part of the page continue as follows:

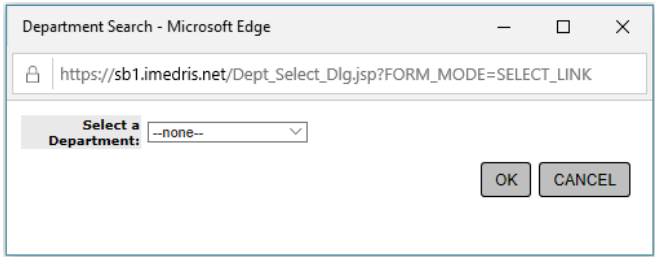
Description — text entry box; entire the desired cost center **Description**

Status — click in the field to open a dropdown list containing selections of "Closed", "Open" and "Pending", then click the desired option to select it

Pricing Level — click in the field to open a dropdown list of options, then click the desired item to select it; note that this list is configured via Animal Resource Center > Review Board Administration > System Setup > Setup Pricing Level link

Valid From / Valid Thru — click the calendar button to open a calendar widget, then use the widget's controls to navigate to the applicable date and click to select it

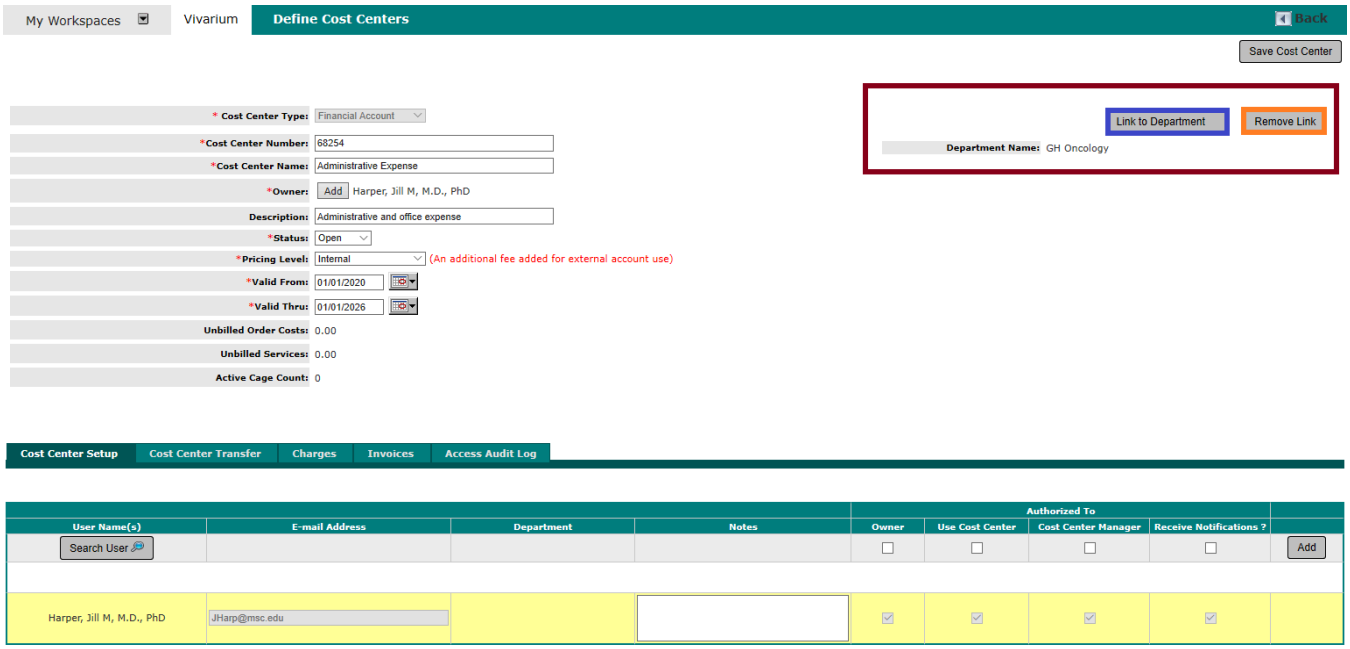
Link to Department (button at upper right) — click this button to open a **Department Search** popup, shown below



Click the **CANCEL** button to close the popup without linking the cost center to a department.

Click in the **Select a Department** field to open a dropdown list of departments, then click the desired department to select it. Click the **OK** button to close the popup and link the selected department to the new cost center.

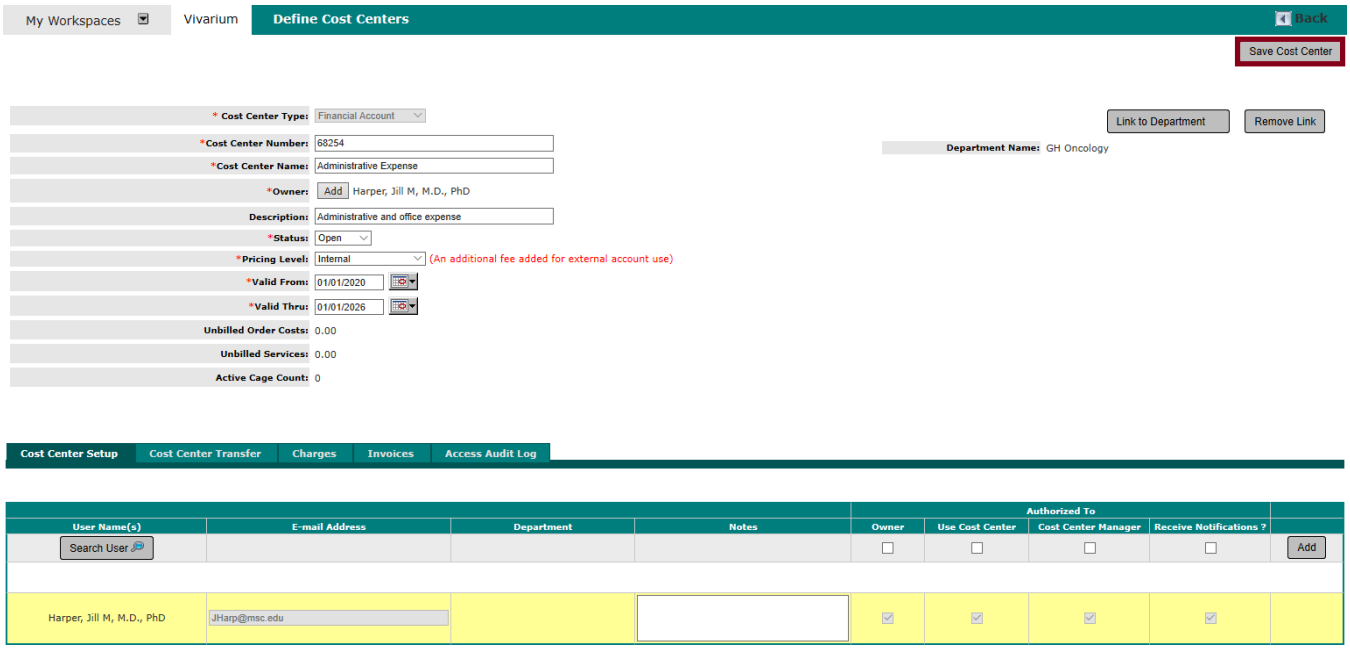
As shown below, the selected department is linked on the cost center add panel (red box).



If the department name shown was selected in error, click the **Link to Department** button (blue box) again and make a different selection in the **Department Search** form. Note that only one department can be linked to the cost center at a time.

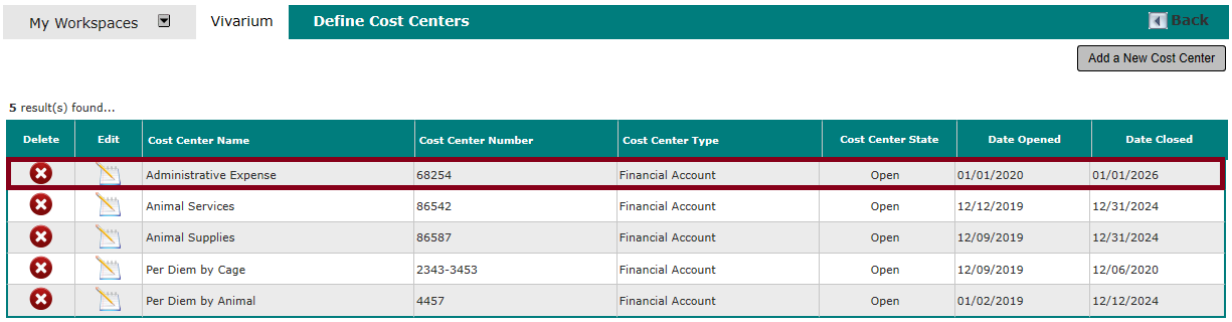
If a department was linked in error and *no* department link is intended for the new cost center, click the **Remove Link** button (orange box).

In the example below the **Define Cost Centers** page is filled. Click the **Save Cost Center** button to create the new cost center.



The new cost center record remains open and is now shown in an edit panel. The **Cost Center Transfer**, **Charges**, **Invoices** and **Access Audit Log** tabs at the bottom of the page are unlocked.

Back on the **Define Cost Centers** list page, the new cost center is added.

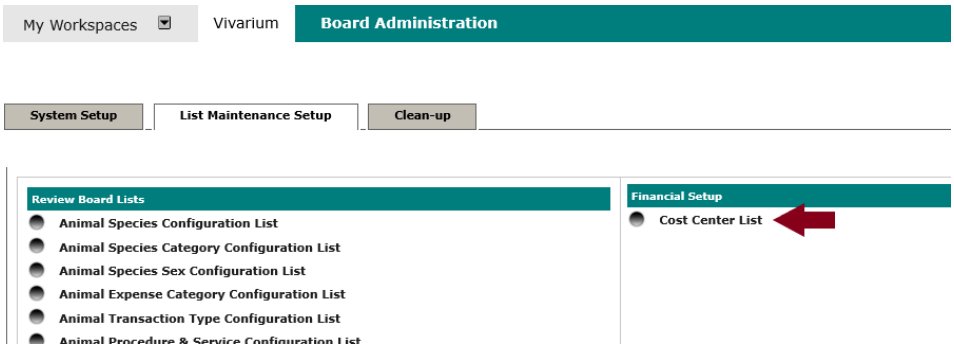


Delete	Edit	Cost Center Name	Cost Center Number	Cost Center Type	Cost Center State	Date Opened	Date Closed
		Administrative Expense	68254	Financial Account	Open	01/01/2020	01/01/2026
		Animal Services	86542	Financial Account	Open	12/12/2019	12/31/2024
		Animal Supplies	86587	Financial Account	Open	12/09/2019	12/31/2024
		Per Diem by Cage	2343-3453	Financial Account	Open	12/09/2019	12/06/2020
		Per Diem by Animal	4457	Financial Account	Open	01/02/2019	12/12/2024

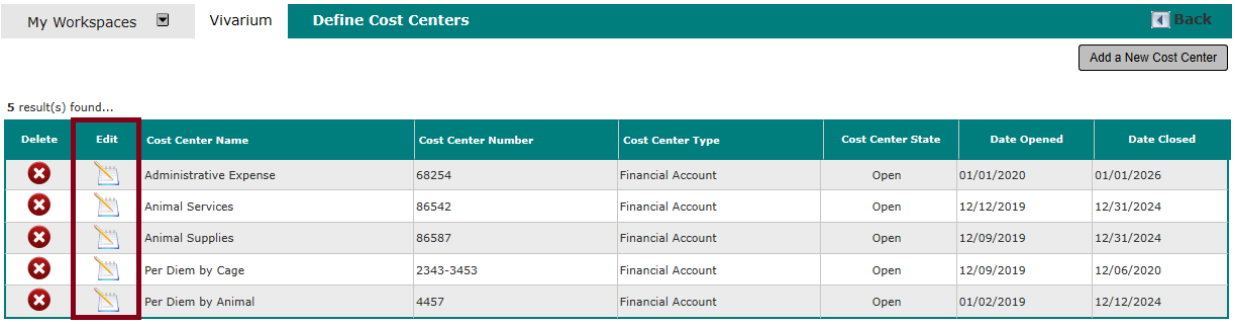
Edit Cost Center

Navigate to Animal Resource Center > Review Board Administration > **List Maintenance Setup** tab and click the **Cost Center List** link in the **Financial Setup** section.

Note that the name of this configuration list can be customized by the institution and may appear as "Account List".

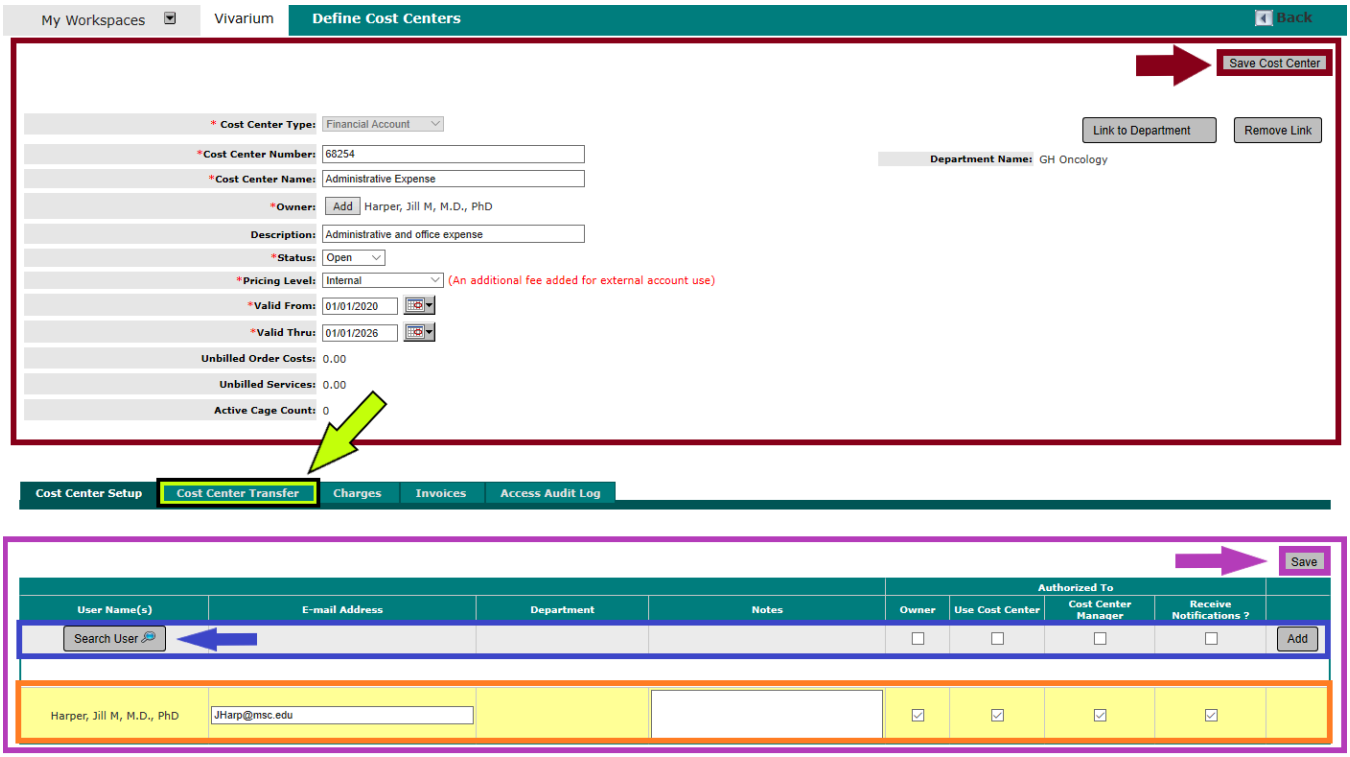


The **Define Cost Centers** page is opened.



Delete	Edit	Cost Center Name	Cost Center Number	Cost Center Type	Cost Center State	Date Opened	Date Closed
		Administrative Expense	68254	Financial Account	Open	01/01/2020	01/01/2026
		Animal Services	86542	Financial Account	Open	12/12/2019	12/31/2024
		Animal Supplies	86587	Financial Account	Open	12/09/2019	12/31/2024
		Per Diem by Cage	2343-3453	Financial Account	Open	12/09/2019	12/06/2020
		Per Diem by Animal	4457	Financial Account	Open	01/02/2019	12/12/2024

Click the icon in the **Edit** column for the applicable cost center. The cost center is opened in an edit panel, as shown below. Colored boxes and arrows in the screenshot highlight the four types of available edits.



Red boxes / arrow — edits made in the upper portion of the panel pertain to cost center setup and owner details; changes made in this area are saved via the **Save Cost Center** button at the upper right (button may be labeled Save Account at some institutions)

Fluorescent green box / arrow — the Cost Center Transfer tab allows for a cost center to be merged into another, pre-existing cost center assigned to the same owner (see Cost Center Transfer Tab subsection of this manual)

Purple boxes / arrow — edits made in the lower portion of the panel pertain to cost center user additions and **Authorized To** rights assignments (blue box enclosed within purple box), and **Authorized To** rights changes for existing cost center users (orange box enclosed within purple box); changes made in this area are saved via the **Save** button at the lower right

Blue box / arrow — users can be added to the cost center, and their access rights configured, in this section of the **Cost Center Setup** tab

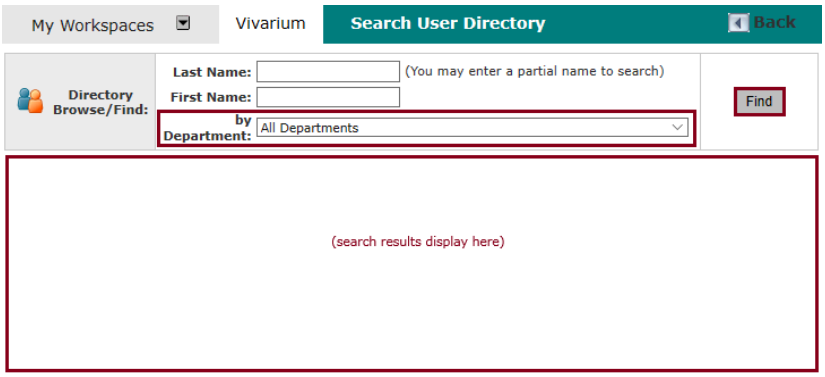
The **Charges**, **Invoices** and **Access Audit Log** tabs are informational only, no changes can be made to the data shown on those tabs.

Revise the fields in the upper section of the edit panel as described below.

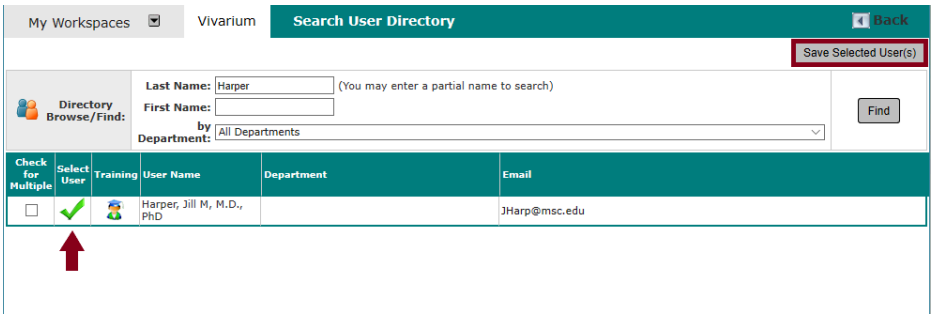
Cost Center Number — text entry field; enter the desired cost center number

Cost Center Name — text entry field; enter the desired cost center name

Owner — click the **Add** button to open the **Search User Directory** page for user lookup and selection to either assign an owner to a cost center that does not currently have an owner assignment, or to reassign the cost center to a different owner

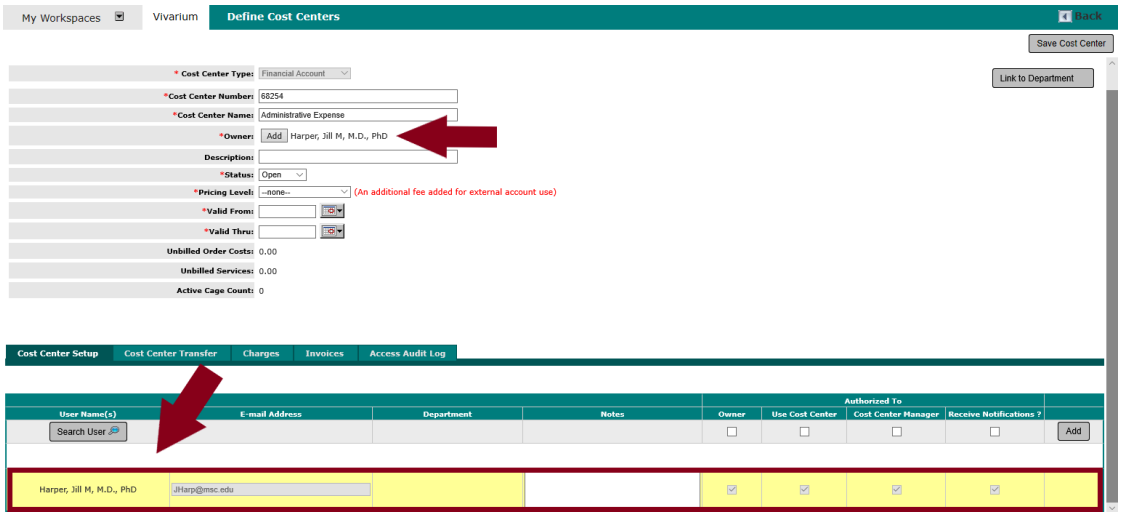


As shown in the screenshot above, the user directory can be searched by full or partial **Last Name** or **First Name**, by **Department**, or by any combination of the three. Enter desired search criteria in the top section of the page and click the **Find** button. Search results display in the lower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



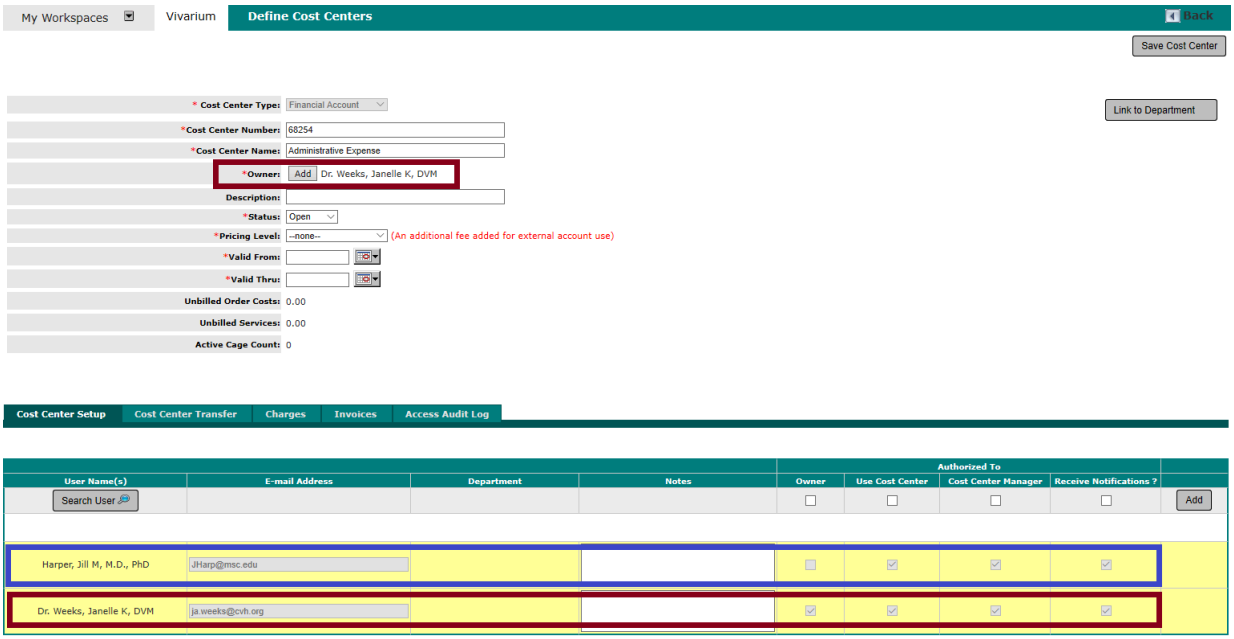
Click the checkmark icon in the **Select User** column to assign the applicable user as the owner of the new cost center. Note that only one user can be assigned as cost center owner, though multiple users can have various access rights to a cost center.

The user is added as cost center **Owner**, as shown below. Notice that the selected user is automatically assigned full rights to all cost center functions in the **Authorized To** section at the bottom of the cost center add panel.



The **Add** button remains for the **Owner** field, indicating that a different user can be substituted for the one originally selected as owner. Note that any user added in this manner is added to, *and remains in*, the list of users at the bottom of the cost center edit panel.

In the example below the **Add** button was clicked again and a different user was assigned as cost center **Owner** (red boxes). Notice that the user previously assigned as owner remains in the list of users assigned to the cost center, but the **Owner** box is no longer selected for that user in the **Authorized To** section at the bottom of the cost center add panel (blue box).



Checkboxes in the **Authorized To** section are unlocked. Select / de-select **Authorized To** checkboxes as desired.

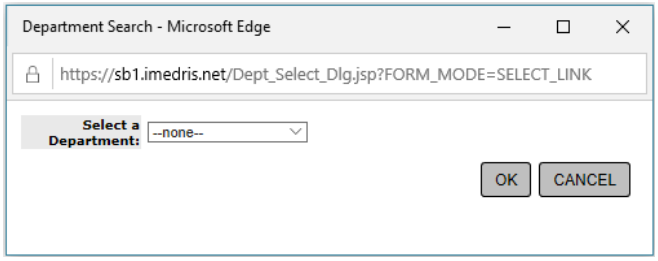
Description — text entry box; entire the desired cost center **Description**

Status — click in the field to open a dropdown list containing selections of “Closed”, “Open” and “Pending”, then click the desired option to select it

Pricing Level — click in the field to open a dropdown list of options, then click the desired item to select it; note that this list is configured via Animal Resource Center > Review Board Administration > System Setup > Setup Pricing Level link

Valid From / Valid Thru — click the calendar button to open a calendar widget, then use the widget’s controls to navigate to the applicable date and click to select it

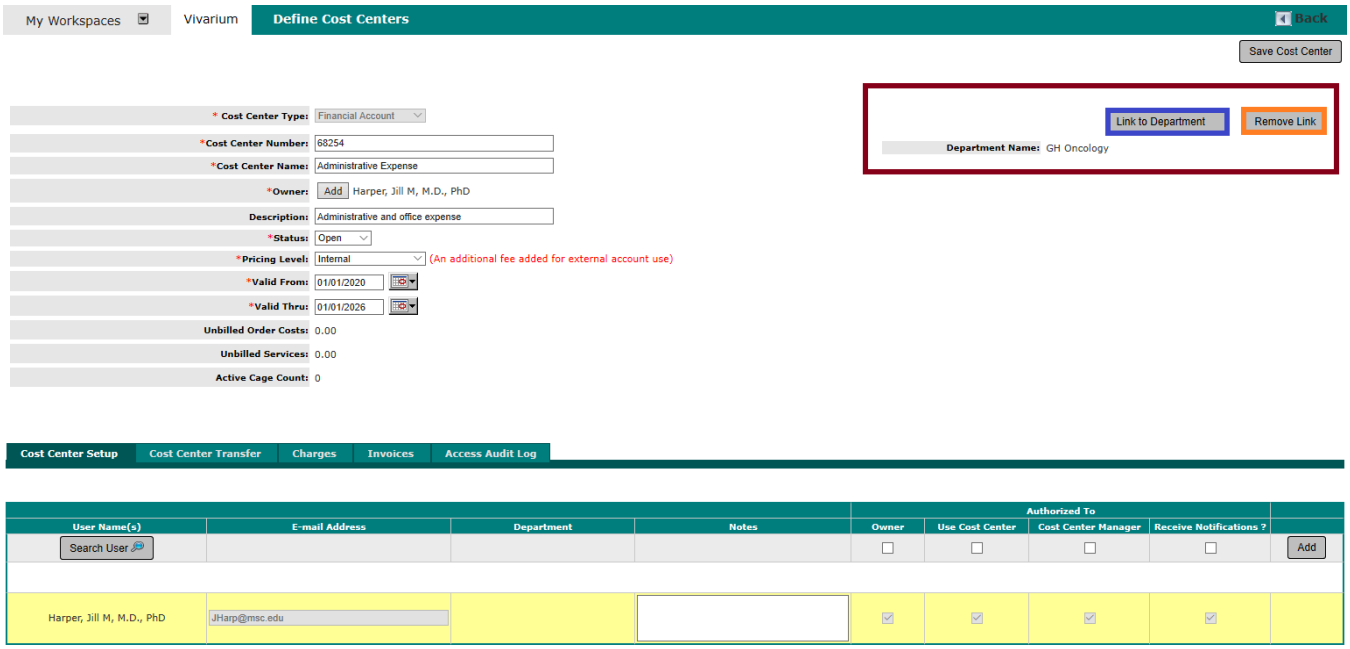
Link to Department (button at upper right) — click this button to open a **Department Search** popup, shown below, to either link the cost center to a department for the first time or to change the department to which the cost center is already linked



Click the **CANCEL** button to close the popup without saving changes.

Click in the **Select a Department** field to open a dropdown list of departments, then click the desired department to select it. Click the **OK** button to close the popup and link the selected department to the cost center.

As shown below, the selected department is linked (red box).



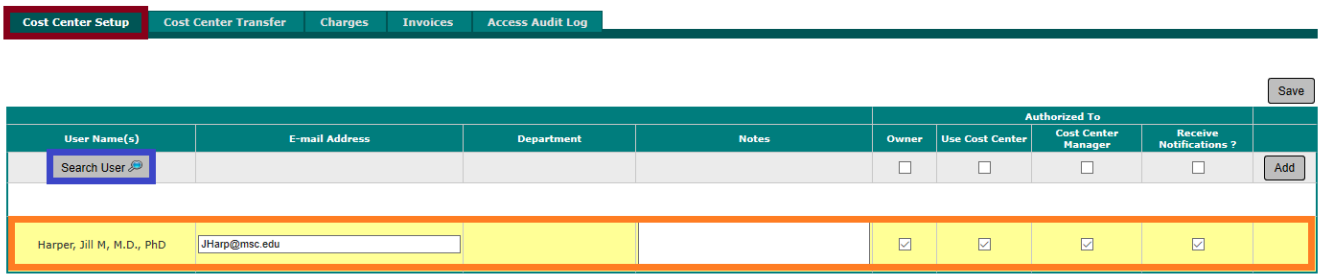
If the department name shown was selected in error, click the **Link to Department** button (blue box) again and make a different selection in the **Department Search** form. Note that only one department can be linked to the cost center at a time.

Remove Link button (orange box) — click this button to remove a department link

Click the **Save Cost Center** button (red box) to save changes.

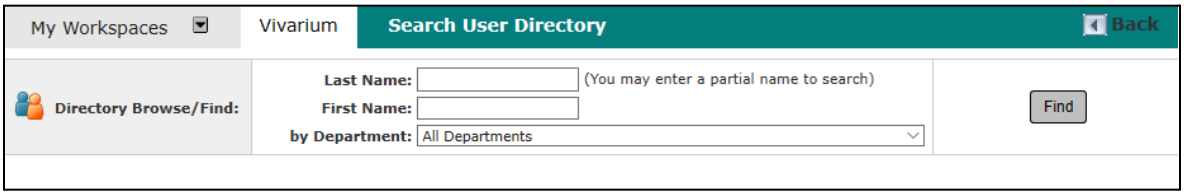
Cost Center Setup Tab

The **Cost Center Setup** tab (may be labeled Account Setup at some institutions) is used to assign and manage cost center user rights.

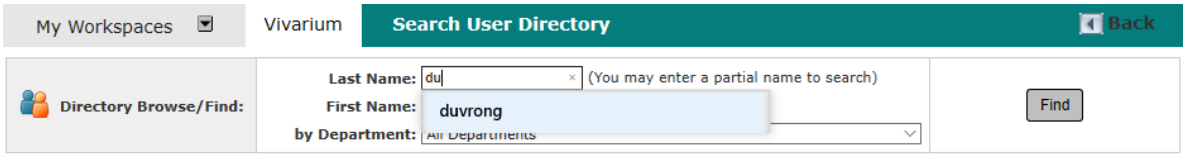


Make desired changes to the **E-mail Address**, **Notes** and **Authorized To** fields for previously assigned users, listed at the bottom of the tab (highlighted in yellow on screen, orange box in screenshot above).

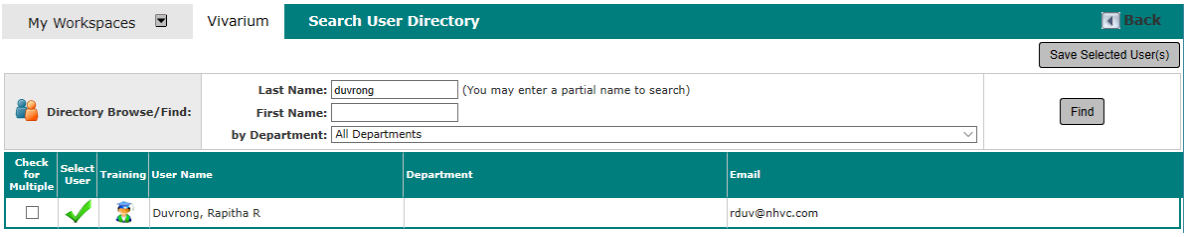
Click the **Search User** button (blue box in screenshot above) to add a new user to the cost center. As shown below, the **Search User Directory** page opens.



Enter a full or partial **Last Name** and/or **First Name** to search by name. As shown below, the **Last Name** field offers a dynamic picklist feature that populates as the **Last Name** is typed into the field.



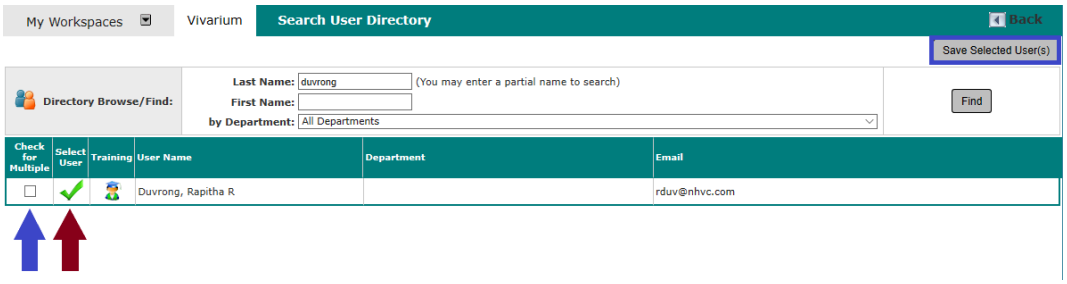
As demonstrated below, clicking on a name shown in the dynamic **Last Name** picklist immediately populates search results with details for that name, it is not necessary to click the **Find** button.



Click in the **by Department** field to open a dropdown list of departments, then click a department in the list to add this criterion to the search. *Note that it is not possible to search by department alone, full or partial **Last Name / First Name** entries are also required.*

When all search criteria are entered, if results are not yet populated click the **Find** button.

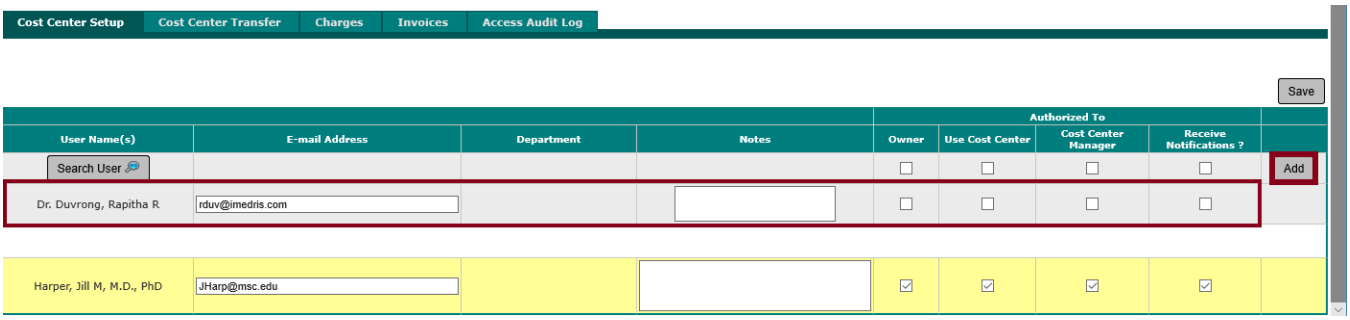
As indicated below, the results section of the page offers two methods for adding users to the cost center.



Assign multiple users to the cost center — if search results include two or more user names to be added to the cost center, select the **Check for Multiple** checkbox at far left (blue arrow) for each user to be added, then click the **Save Selected User(s)** button at the upper right (blue box)

Assign single user to the cost center — click the green checkmark for the applicable user (red arrow)

When the applicable user(s) is(are) selected from the **Search User Directory** page, that page closes and the name(s) is(are) added to the **Cost Center Setup** tab as shown below.



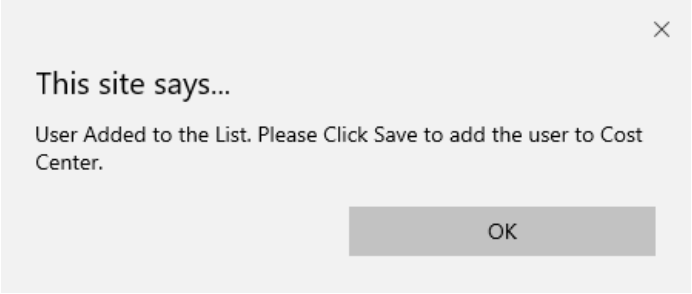
Make any desired changes to the **E-mail Address** and **Notes** field for each added user.

Select the applicable checkboxes in the **Authorized To** section to assign cost center rights for the user.

*Note that only one user can be designated as cost center owner. Selecting the **Owner** checkbox for a different user than the user currently assigned as cost center owner automatically de-selects the **Owner** checkbox for the currently assigned owner. When changes are saved the different user is assigned as cost center owner and the previously assigned owner remains as a cost center user with any remaining **Authorized To** rights.*

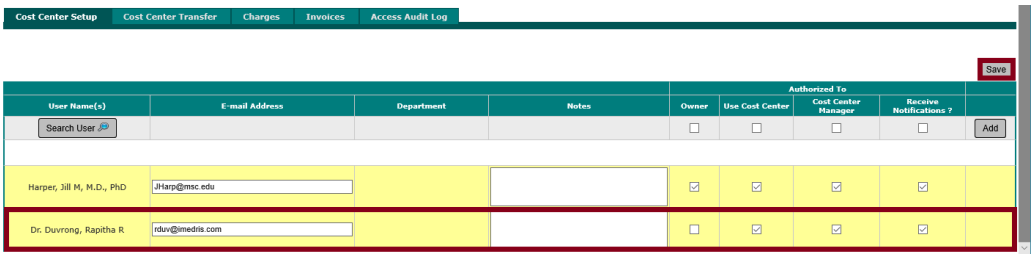
When changes are complete click the **Add** button at the far right of the **Cost Center Setup** tab. The new user is added to the user list on the **Cost Center Setup** tab.

A popup appears, warning that the user is added to the list but that these changes are not saved to the cost center record until the **Save** button on the **Cost Center Setup** tab is clicked.

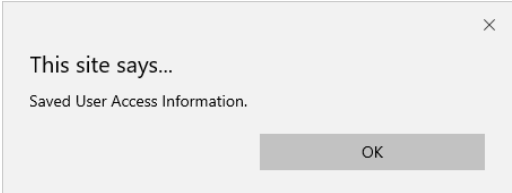


Click **OK** to close the popup and return to the cost center edit panel. The new user(s) is(are) added to the list at the bottom of the **Cost Center Setup** tab.

Make any desired changes to the **E-mail Address** field, **Notes** field and **Authorized To** selections for the added user(s), then click the **Save** button, as shown below.



A confirmation popup appears, as shown below.



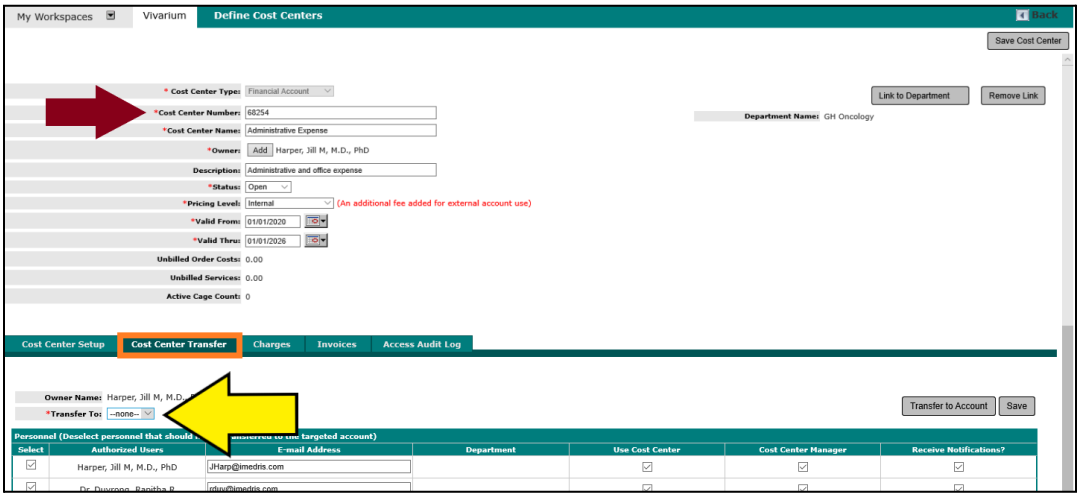
Click **OK** to close the popup.

The new user(s) is(are) added to the cost center with the selected **Authorized To** rights, it is not necessary to also click the **Save Cost Center** button in the upper portion of the **Define Cost Centers** edit panel.

Cost Center Transfer Tab

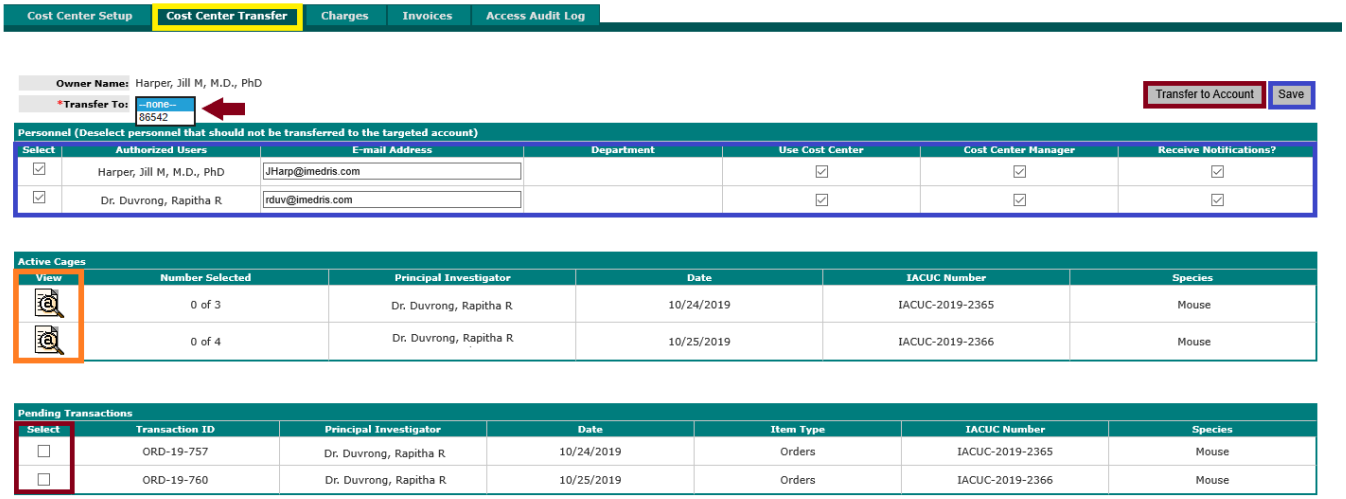
The **Cost Center Transfer** tab (may be labeled Account Transfer at some institutions) is used to transfer cages and transactions between cost centers owned by the same user, and to adjust user access rights to the reassigned items.

As highlighted in the screenshot below, item transfers completed here move those items *out of* the cost center shown in the **Cost Center Number** field in the upper portion of the **Define Cost Centers** page edit panel (red arrow) and *into* the cost center selected in the **Transfer To** field (yellow arrow) in the **Cost Center Transfer** tab.



The **Cost Center Transfer** tab is shown in isolation for the remainder of this manual topic.

*IMPORTANT: When viewing screenshots of the **Cost Center Transfer** tab for the remainder of this topic, bear in mind that items transferred are being removed from the cost center shown in the upper portion of the edit panel.*



Colored boxes and arrows in the screenshot above highlight the available features of this tab.

Transfer To — (red arrow) dropdown picklist of cost centers for which the user listed in the **Owner Name** field is owner

Transfer to Account button — (red box) completes cost center item transfers when all desired changes are complete in the tab

Personnel section — (large blue box) provides access to assign listed users to a different cost center, edit listed users' email addresses and assign listed users' cost center rights; changes made in this section are saved via the **Save** button immediately above the section (small blue box)

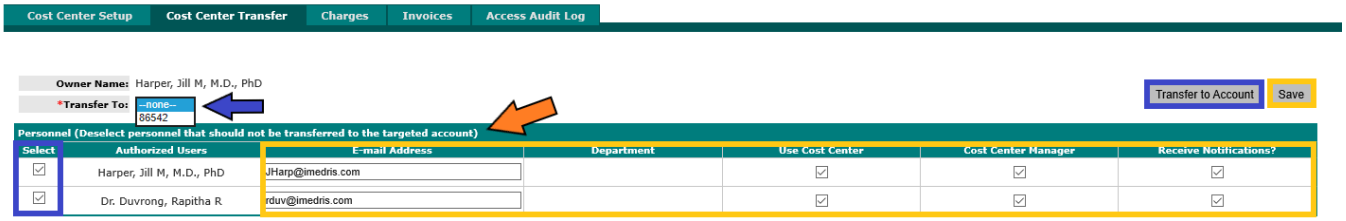
Active Cages section — lists all active cages currently assigned to the cost center shown in the upper portion of the Define Cost Centers edit panel; icons in the **View** column (orange box) open a separate page for reassigning the cages individually or in bulk

Pending Transactions section — lists all pending transactions currently assigned to the cost center shown in the upper portion of the **Define Cost Centers** edit panel; **Select** boxes are provided to specify items to be transferred to the cost center selected in the **Transfer To** field

The following subsections provide details of each transfer type.

Transfer Personnel

The screenshot below highlights controls used in cost center personnel changes.



Click in the **Transfer To** field (blue arrow) to open a dropdown picklist of available cost centers. The list is limited to cost centers for which the user selected in the upper section of the **Define Cost Centers** edit panel has Owner rights (see previous manual subsection, Cost Center Transfer Tab, for a full screenshot of the edit panel). Click the cost center in the list to which the user(s) is(are) to have rights assigned.

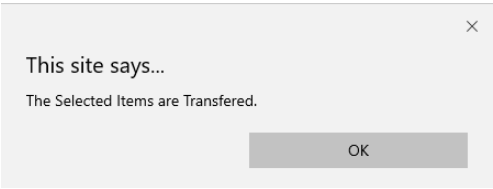
*Note that the first name shown at the top of the **Authorized Users** list will always be the owner of the cost center currently open in the upper section of the **Define Cost Centers** edit panel (see previous manual subsection, Cost Center Transfer Tab, for a full screenshot of the edit panel).*

Select checkboxes for all listed users are selected by default (blue box). As indicated by section instructions (orange arrow), click to de-select the checkboxes for any users who will not be assigned rights to the cost center selected in the **Transfer To** field.

Make any desired edits to the listed users' **E-mail Address**(es) (large yellow box).

Click to select / de-select the checkboxes for rights to be assigned for each user (large yellow box) for the cost center selected in the **Transfer To** field. *Recall that changes made here will only be applied for users with a checkmark in the select box of the **Select** column at far left.*

Click the **Transfer to Account** button (blue box) to complete the new user cost center rights assignments. A confirmation popup displays, as shown below.



Click **OK** to close the popup and return to the edit panel of the **Define Cost Centers** page.

Personnel Changes in Cost Center Currently Open for Editing

The **Cost Center Transfer** tab can also be used to make changes to listed users' **E-mail Address**(es) and/or cost rights (large yellow box) without assigning rights to other cost centers or transferring any items between cost centers.

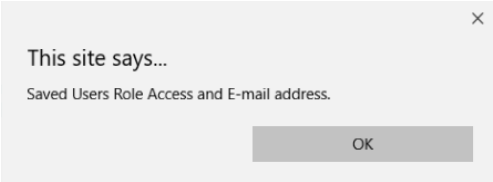
Changes made following these directions will only be applied for the cost center *currently open* in the **Define Cost Centers** edit panel (see previous manual subsection, Cost Center Transfer Tab, for a full screenshot of the edit panel).

Select “--none--" in the **Transfer To** box. This selection specifies changes are only to be applied to the cost center *currently open* in the **Define Cost Centers** edit panel.

Make any desired edits to the listed users’ **E-mail Address**(es) (large yellow box).

Click to select / de-select the checkboxes for rights to be assigned for each user (large yellow box).

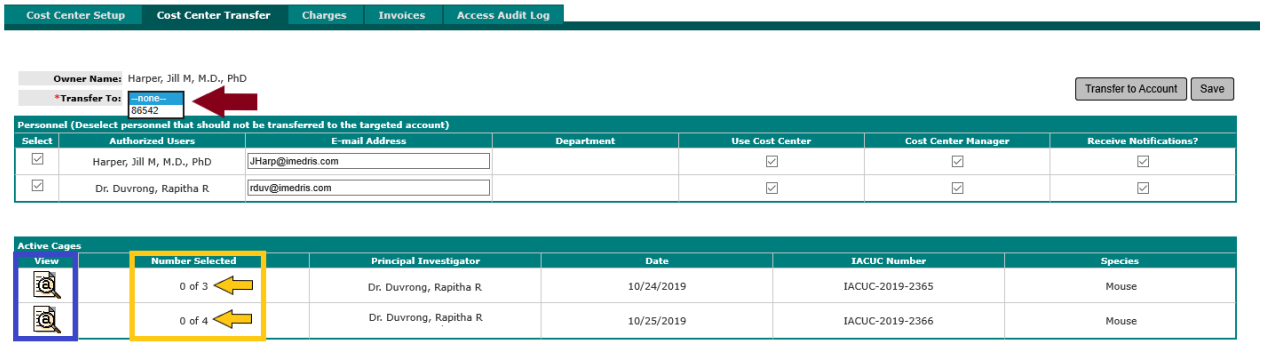
Click the **Save** button (small yellow box) to save changes. A confirmation popup displays, as shown below.



Click **OK** to close the popup and return to the edit panel of the **Define Cost Centers** page.

Transfer Cages

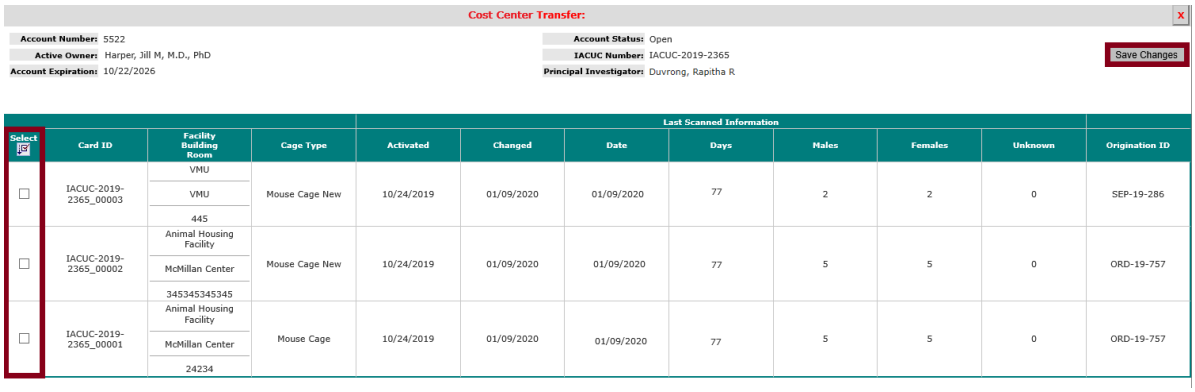
The screenshot below highlights controls used in cost center cage transfers.



Click in the **Transfer To** field (red arrow) to open a dropdown picklist of available cost centers. The list is limited to cost centers for which the user selected in the upper section of the **Define Cost Centers** edit panel has Owner rights (see previous manual subsection, Cost Center Transfer Tab, for a full screenshot of the edit panel). Click the cost center in the list to which active cages are to be transferred.

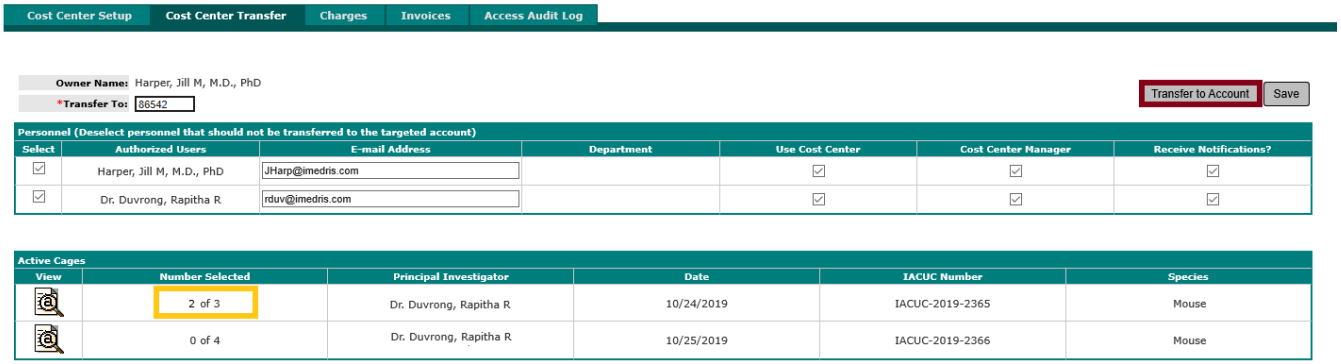
The **Active Cages** section provides information about each active set of cages currently assigned to the cost center that is open for editing (see previous manual subsection, Cost Center Transfer Tab, for a full screenshot of the edit panel). Notice that before any changes are made the **Number Selected** column (yellow box) shows that for each active cage line item, zero (0) of the total number of active cages are selected.

Click the icon in the **View** column (blue box) for the active cage line item to have one or more cages transferred to the cost center selected in the **Transfer To** field. The **Cost Center Transfer** page (may be labeled Account Transfer at some institutions) opens, as shown below.

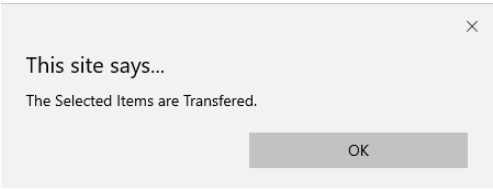


Click the checkbox(es) in the **Select** column to select the cage(s) to be transferred to a different cost center, then click the **Save Changes** button to close this page and return to the **Define Cost Centers** page.

As shown below, the **Number Selected** field updates for the line item where cages are to be transferred (yellow box).



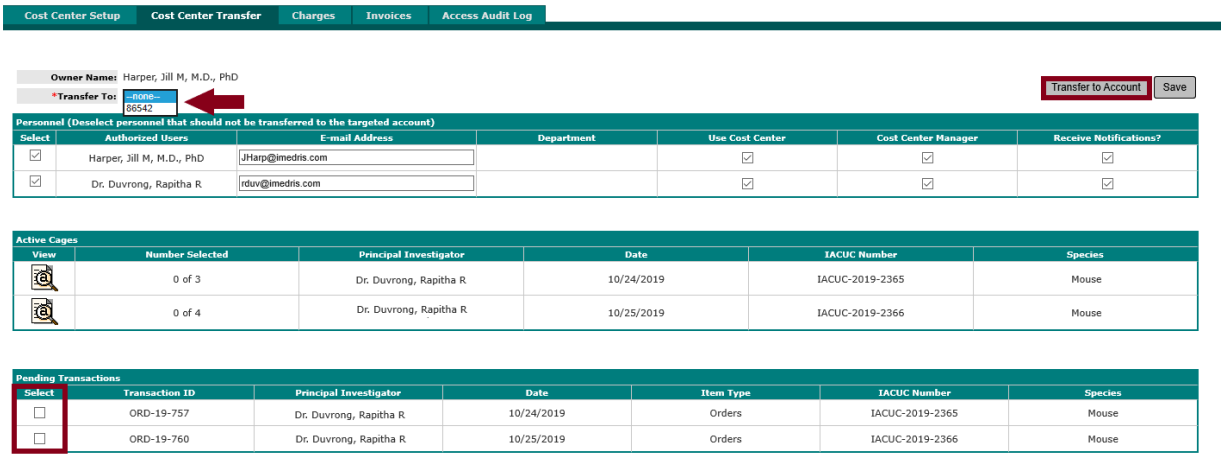
Repeat the process of cage selection for any other desired **Active Cages** line items, then click the **Transfer to Account** button (red box in screenshot above). A confirmation popup displays, as shown below.



Click **OK** to close the popup and return to the edit panel of the **Define Cost Centers** page.

Transfer Transactions

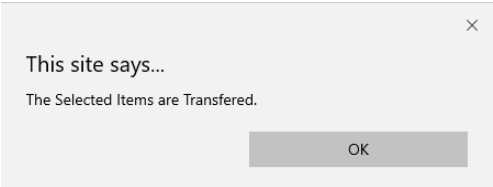
The screenshot below highlights controls used in transfers of **Pending Transactions** between cost centers.



Click in the **Transfer To** field (red arrow) to open a dropdown picklist of available cost centers. The list is limited to cost centers for which the user selected in the upper section of the **Define Cost Centers** edit panel has Owner rights (see previous manual subsection, Cost Center Transfer Tab, for a full screenshot of the edit panel). Click the cost center in the list to which active cages are to be transferred.

Click the applicable checkbox(es) in the **Select** column of the **Pending Transactions** section (red box at lower left of screenshot above) to select transactions to be transferred to the cost center selected in the **Transfer To** field.

A confirmation popup displays, as shown below.

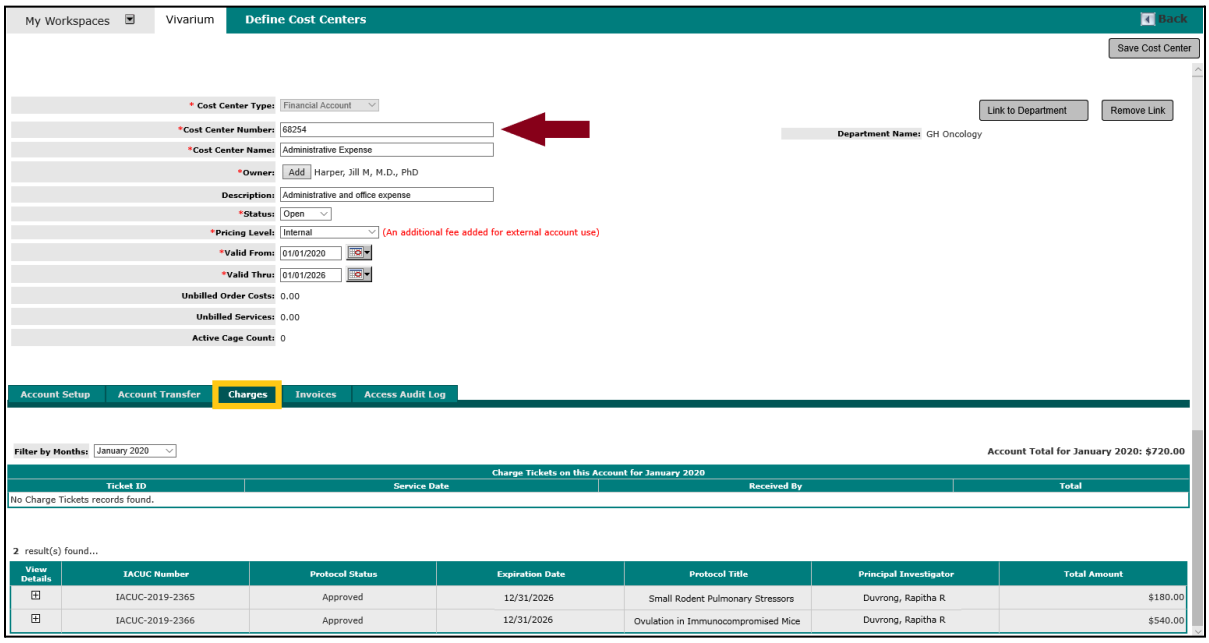


Click **OK** to close the popup and return to the edit panel of the **Define Cost Centers** page. As shown below, the transferred transaction is removed from the **Pending Transactions** list.

Charges Tab

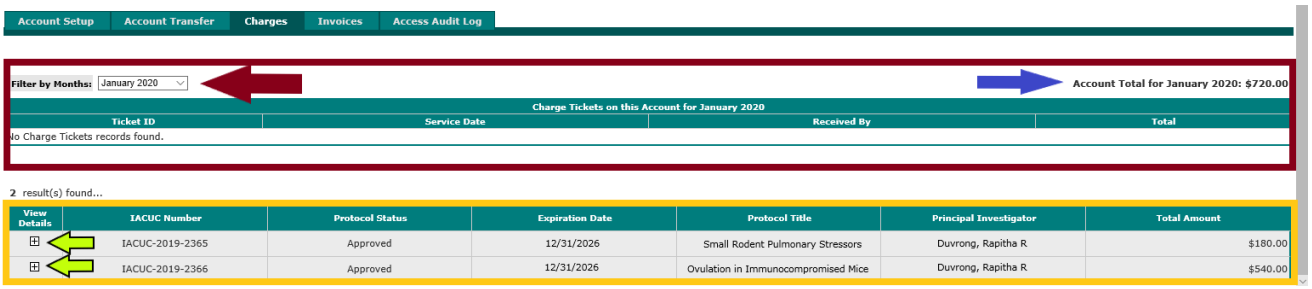
The **Charges** tab is used to view details of charges under the cost center currently open for editing in the **Define Cost Centers** page. Note that data related to cost center charges is presented in the following pages and panels as view only, no editing is allowed.

Charge items displayed here are assigned to the cost center shown in the **Cost Center Number** field in the upper portion of the **Define Cost Centers** page edit panel (red arrow).



The **Charges** tab and related pages are shown in isolation for the remainder of this manual subsection.

The screenshot below highlights the different types of charge item information available via the **Charges** tab.



The total of charges assigned to the cost center that is open for editing is shown at the upper right of the **Charges** tab (blue arrow).

Click in the **Filter by Month** field to open a dropdown picklist of months. The list allows for searching up to twelve (12) months in the past and up to twelve (12) months in the future. Any filter selection made in this field is applied to both the upper (red box) and lower (yellow box) sections of the tab.

The upper section of the tab (red box) is used to view Charge Ticket items. Charge Tickets created, or that are still outstanding, in the selected month automatically populate in the list beneath the **Filter by Month** field.

The lower section of the tab (yellow box) displays a summary view of cage charges. Click the plus sign in the **View Details** column (fluorescent green arrows) to expand a row of daily cage counts for the selected line item.

A countdown popup displays to warn the user it may take several seconds to populate the new data.

This operation may take several seconds.

OK (1)

When the popup closes the **View Details** plus sign icon is changed to a minus sign (red arrow), indicating the row is expanded, and cage count details (blue arrow) are visible for the selected line item in the **Charges** tab.

2 result(s) found...

View Details	IACUC Number	Protocol Status	Expiration Date	Protocol Title	Principal Investigator	Total Amount
⊟	IACUC-2019-2365	Approved	12/31/2026	Small Rodent Pulmonary Stressors	Duvrong, Rapitha R	$180.00
⊞	IACUC-2019-2366	Approved	12/31/2026	Ovulation in Immunocompromised Mice	Duvrong, Rapitha R	$540.00

Daily Cage Count for January 2020

Cage Type	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Collection By	Care Days	Rate	Animal Quantity	Charges
Mouse Cage	1	1	1	1	1	1	1	1	1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	By Cage	9	$20.00	By Cage	$180.00

Click any of the **Daily Cage Count** numbers shown in the cage count detail row to open the **Per Diem** page.

Per Diem

Account Number: 5522
Active Owner: Harper, Jill M, M.D., PhD
Account Expiration: 10/22/2026
Account Status: Open
IACUC Number: IACUC-2019-2365
Principal Investigator: Duvrong, Rapitha R

	Cage ID	Facility Building Room	Cage Type	Activated	Changed	Deactivated	Last Scanned Information: Date	Days	Males	Females	Unknown	Origination ID
	IACUC-2019-2365_00001	Animal Housing Facility / McMillan Center / 24234	Mouse Cage	10/24/2019	01/10/2020		11/05/2019		5	5	0	ORD-19-757

Cage ID, location and other details for the selected cage are presented here. Click the icon in the far-left column of the **Per Diem** page (red box in screenshot above) to open the **ARC-Cage Activity History** page, shown below.

ARC-Cage Activity History

Cage ID: IACUC-2019-2365_00001
IACUC Number: IACUC-2019-2365
Principal Investigator: Duvrong, Rapitha R
Account Owner: Harper, Jill M, M.D., PhD
Account Number: 5522
Cage Status: Active
Cage Type: Mouse Cage
Facility: Animal Housing Facility
Building: McMillan Center
Room: 24234
Activation Date: 10/24/2019
Origination ID: ORD-19-757
Date last modified: 01/10/2020
Last Scanned : 11/05/2019
Last Printed : 10/24/2019
Deactivation Date :
Comments :

Date & Time	Effective Date	IACUC Number	Cage Type	Facility	Building	Room	Account Number	Activity Description	User
10/24/2019 10:19:02 AM PDT	10/24/2019 12:00:00 AM PDT	IACUC-2019-2365	Mouse Cage	Animal Housing Facility	McMillan Center	24234	5522	Cage is created.	Rapitha Duvrong
10/24/2019 10:19:08 AM PDT	10/24/2019 12:00:00 AM PDT	IACUC-2019-2365	Mouse Cage	Animal Housing Facility	McMillan Center	24234	5522	Cage is activated.	Rapitha Duvrong
10/24/2019 10:19:08 AM PDT	10/24/2019 12:00:00 AM PDT	IACUC-2019-2365	Mouse Cage	Animal Housing Facility	McMillan Center	24234	5522	Cage status is changed.	Rapitha Duvrong
10/24/2019 10:20:21 AM PDT	10/24/2019 12:00:00 AM PDT	IACUC-2019-2365	Mouse Cage	Animal Housing Facility	McMillan Center	24234	5522	Cage is activated.	Rapitha Duvrong
10/24/2019 10:20:21 AM PDT	10/24/2019 12:00:00 AM PDT	IACUC-2019-2365	Mouse Cage	Animal Housing Facility	McMillan Center	24234	5522	Cage status is changed.	Rapitha Duvrong
10/24/2019 10:20:21 AM PDT	10/24/2019 12:00:00 AM PDT	IACUC-2019-2365	Mouse Cage	Animal Housing Facility	McMillan Center	24234	5522	barcode is changed.	Rapitha Duvrong
11/05/2019 01:56:13 PM PST	11/05/2019 12:00:00 AM PST	IACUC-2019-2365	Mouse Cage	Animal Housing Facility	McMillan Center	24234	5522	Cage is activated.	Rapitha Duvrong
11/05/2019 01:57:25 PM PST	11/05/2019 12:00:00 AM PST	IACUC-2019-2365	Mouse Cage	Animal Housing Facility	McMillan Center	24234	5522	Cage is activated.	Rapitha Duvrong

Back

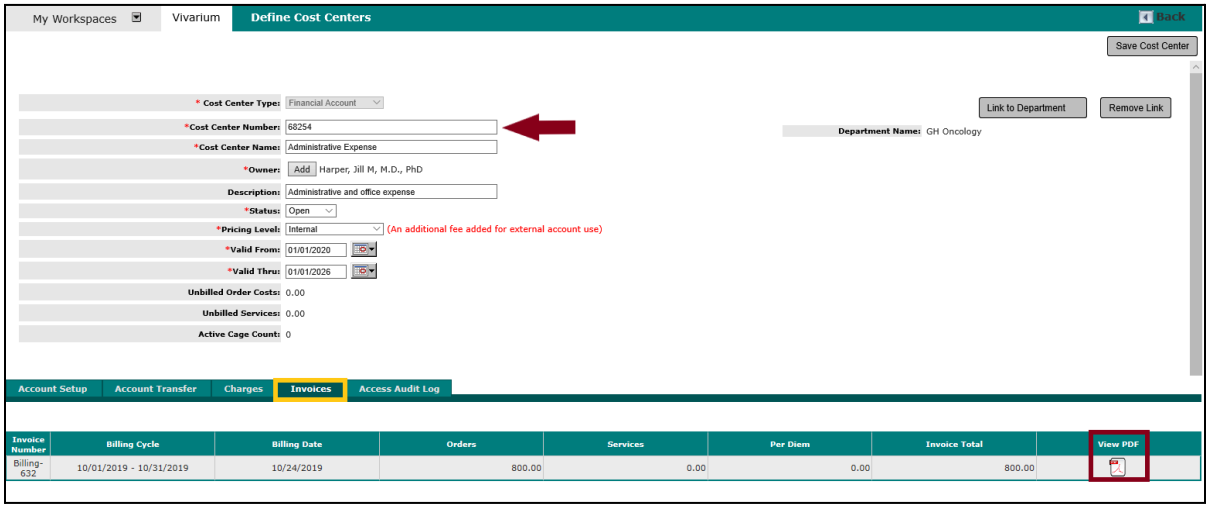
Click the red X icon at the upper right corner or the Back button at the lower right to close the **ARC-Cage Activity History** page and return to the **Per Diem** page.

Click the red X icon at the upper right corner of the Per Diem page to close it and return to the **Charges** tab of the **Define Cost Centers** page.

Invoices Tab

The **Invoices** tab is used to view details of invoices under the cost center currently open for editing in the **Define Cost Centers** page. Note that data related to cost center invoices is presented as view only, no editing is allowed.

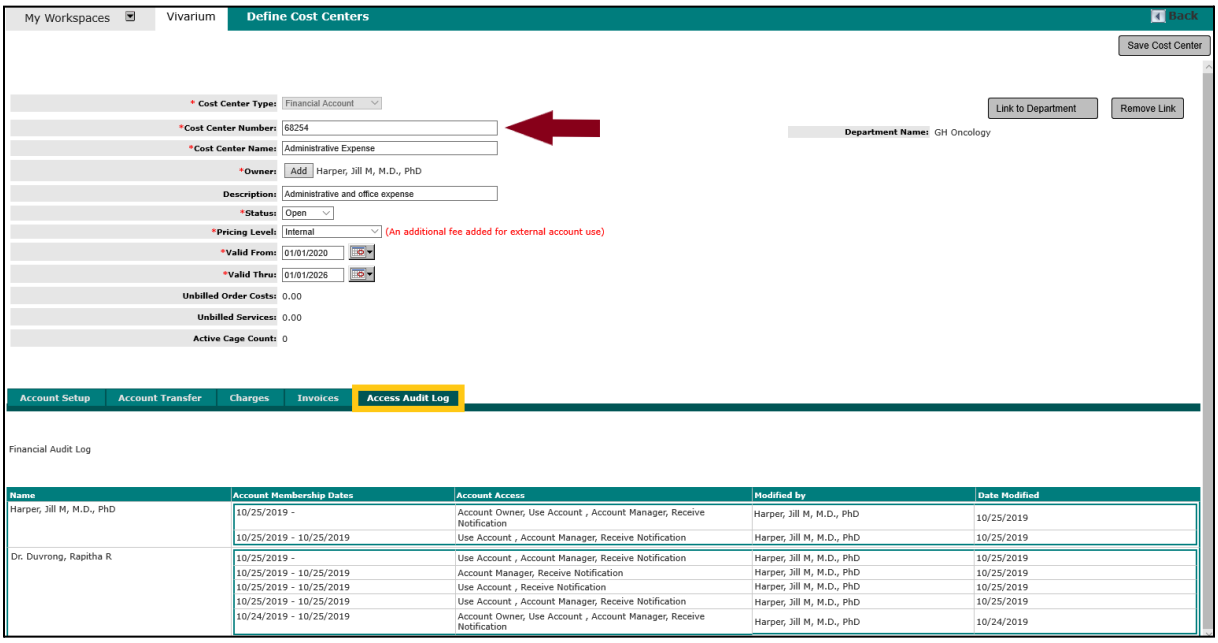
Invoices displayed here are assigned to the cost center shown in the **Cost Center Number** field in the upper portion of the **Define Cost Centers** page edit panel (red arrow).



Click the icon in the **View PDF** column (red box in screenshot above) to view a PDF copy of the applicable invoice.

Access Audit Log Tab

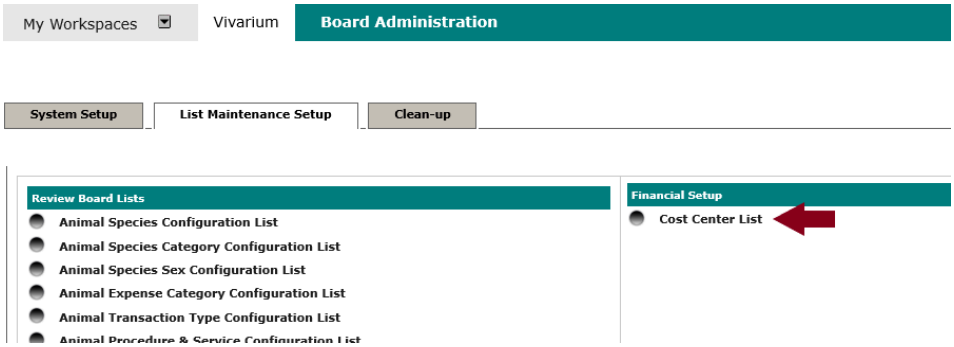
The **Access Audit Log** tab is used to view audit log details of the cost center currently open for editing in the **Define Cost Centers** page (red arrow in screenshot below). Note that audit data is presented as view only, no editing is allowed.



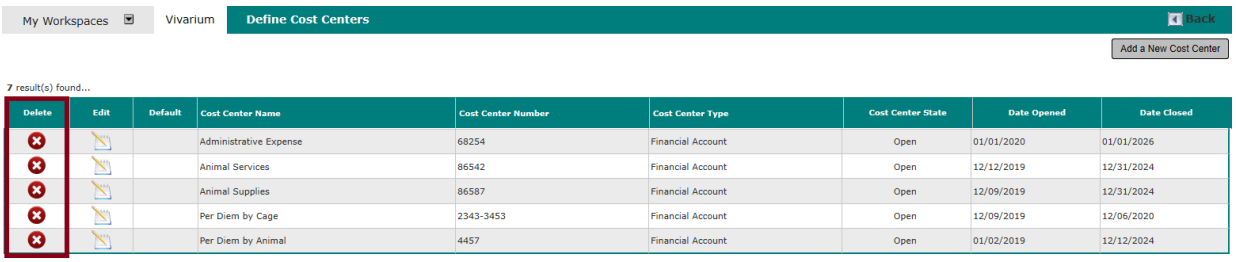
Delete Cost Center

Navigate to Animal Resource Center > Review Board Administration > **List Maintenance Setup** tab and click the **Cost Center List** link in the **Financial Setup** section.

Note that the name of this configuration list can be customized by the institution and may appear as "Account List".

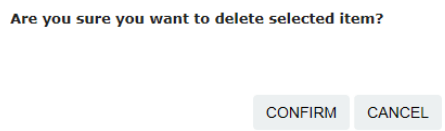


The **Define Cost Centers** page is opened.



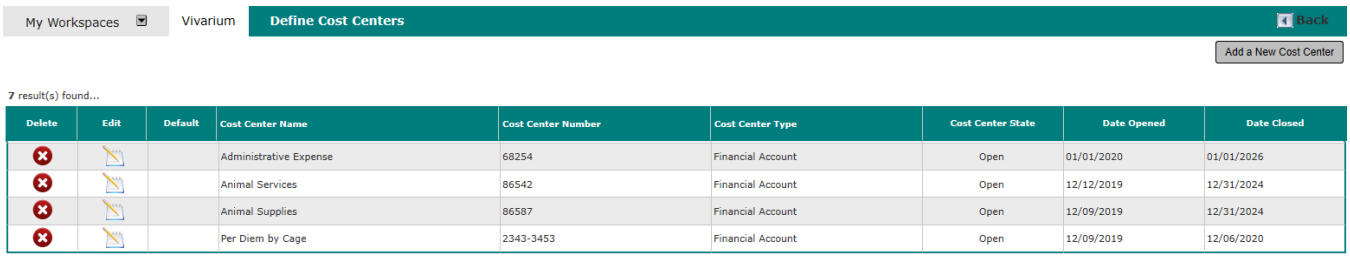
CAUTION: Deleting a cost center with pending transactions and/or invoices can result in orphaned accounting records. It is the responsibility of the institution to ensure that all accounting records assigned to a cost center are transferred to a different cost center (see Transfer Transactions subsection of this manual), deleted or otherwise reconciled before that cost center is deleted.

Click the icon in the **Delete** column for the cost center to be deleted. A confirmation popup displays, as shown below.



Click **CANCEL** to close the popup without deleting the applicable cost center and return to the **Define Cost Centers** page.

Click **CONFIRM** to delete the applicable cost center and return to the **Define Cost Centers** page. As shown below, the cost center is deleted.



Delete	Edit	Default	Cost Center Name	Cost Center Number	Cost Center Type	Cost Center State	Date Opened	Date Closed
			Administrative Expense	68254	Financial Account	Open	01/01/2020	01/01/2026
			Animal Services	86542	Financial Account	Open	12/12/2019	12/31/2024
			Animal Supplies	86587	Financial Account	Open	12/09/2019	12/31/2024
			Per Diem by Cage	2343-3453	Financial Account	Open	12/09/2019	12/06/2020