

McGill



Darwin Manual

Animal Facility Supervisor Office Users

McGill University

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Introduction

This manual was developed for users with the role of Animal Facility Supervisor (ASUPER)

Within this application, The ASUPER can perform the following functions:

- Approve animal orders
- Process the received animal shipments
- Generate receipt reports
- Perform Room and Cage searches and generate reports
- Perform protocol searches and generate reports
- Apply Service and Supply charges

Login to Darwin Web

To login to Darwin web-based application:

1. Open your web browser (i.e. Internet Explorer, Firefox or Safari) and type the following URL:
<https://darwin.research.mcgill.ca> .
2. The Darwin login screen opens. Enter your *McGill Short Username and McGill Password in the corresponding fields.
3. Click the login to Darwin button



Welcome to **Darwin**, your access to Animal Care Committee and animal care information and management system.

Log in using the McGill Short Username (such as jdoe or jsmith4):

Short Username:

McGill Password:

[For questions, assistance and requests, contact us.](#)

 **McGill**



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*McGill Short Username and McGill Password: for more information, go to
<http://kb.mcgill.ca/kb/?ArticleId=1025>

For non-McGill Staff: they will be issued a McGill Short Username.

Can't login? Contact Darwin Support by completing the Web Form at
<http://www.mcgill.ca/research/researchers/compliance/animal/software/webform>

Darwin Web Application Home Page

Upon successful login, the Darwin **Home Page** opens.

When you login to the Darwin Web Application, the Darwin Web Application **Home Page** opens.

In the following example, the **ASUPER (Animal Facility Supervisor)** user's home page is displayed. If you are assigned to another security role, the home page may differ depending on options that are assigned to your security role.



Tip

If you have more than one security role, and are on more than one site, please ensure that you are in the ASUPER (Animal facility Supervisor) role on the site in which you are working.

Home Page

Rvh, Supervisor

ASUPER

SIGN OUT

REFRESH

07/05/2013

Alerts

[Alerts New](#)
[Standing Orders Due](#)
[Orders Deliveries](#)
[Orders Placed](#)
[Standing Orders Deliveries](#)

Protocols

[Animal Orders](#)
[Animal Husbandry \(Census\)](#)
[Services](#)

Roles

[PI](#)
[PIACOTG](#)
[Change Password](#)

ALERTS -- NEW ANIMAL ORDERS

Source	Vendor	Other Source	Order #	Order Date	Requestor	Protocol	Species	Work Flow Status	Placed At
Vendor Purchases	Charles River Laboratories		V007921	07/02/2013	Rvh, Investigator	2012-7267	Mice	Facility Supervisor	
Vendor Purchases	Jackson Laboratories		V007922	07/02/2013	Rvh, Investigator	2012-7267	Mice	Facility Supervisor	
Vendor Purchases	Charles River Laboratories		V007923	07/02/2013	Rvh, Investigator	2012-7267	Rats	Facility Supervisor	
Vendor Purchases	Charles River Laboratories		V007924	07/02/2013	Morecourt, Bruna	2012-7267	Mice	Facility Supervisor	11:35:59

ALERTS -- ANIMAL STANDING ORDERS DUE

Next Plan #	Order #	Principal Investigator	Expiration Date	SO Expiration Date	Description	Expected Date	Protocol No	Other Source	Requestor	Vendor Name
3	V007919	Rvh, Investigator	12/01/2015	08/02/2013	Experimental Group	07/11/2013	2012-7267		Rvh, Investigator	Charles River Laboratories
1	V007920	Rvh, Investigator	12/01/2015	07/19/2013	Study #10	07/09/2013	2012-7267		Rvh, Investigator	Jackson Laboratories

ALERTS -- DELIVERY SCHEDULE

Expected	Source	Vendor	Other Source	Vendor Loc	Order #	Item #	Requestor	Phone	Qty	Species	Strain	Age	Weight	Sex	Location	Room	Per Diem	Placed On
07/09/2013	Vendor Purchases	Charles River Laboratories			V007919-1	1	Rvh, Investigator	5141111111111111	6	Rats	Zucker			M	Rvh Animal Facility-TEST		Rat conventional	07/02/2013
07/10/2013	Vendor Purchases	Charles River Laboratories			V007919-2	1	Rvh, Investigator	5141111111111111	6	Rats	Zucker			M	Rvh Animal Facility-TEST		Rat conventional	07/02/2013

ALERTS -- PLACED ORDERS

Source	Vendor	Other Source	Order #	Order Date	Placed On	Species	Requestor	Protocol
Vendor Purchases	Charles River Laboratories		V007919-1	07/02/2013	07/02/2013	Rats	Rvh, Investigator	2012-7267
Vendor Purchases	Charles River Laboratories		V007919-2	07/02/2013	07/03/2013	Rats	Rvh, Investigator	2012-7267

ALERTS -- INCOMING STANDING ORDER SHIPMENTS

Source	Vendor	Other Source	Order #	Order Date	Placed On	Requestor	Protocol	Species	Work Flow Status
Vendor Purchases	Charles River Laboratories		V007919-1	07/02/2013	07/02/2013	Rvh, Investigator	2012-7267	Rats	Facility Supervisor
Vendor Purchases	Charles River Laboratories		V007919-2	07/02/2013	07/03/2013	Rvh, Investigator	2012-7267	Rats	Facility Supervisor

PROTOCOLS

[Compliance Reports](#)
[Protocol Conflict Reports](#)

ANIMAL ORDERS

[Auto Receive Animal Shipments](#)
[Request on Search](#)
[Animal Receipt Reports](#)

ANIMAL HUSBANDRY (CENSUS)

[Activate Cages for Weaned Animals](#)
[Deactivate Cages for Used Cages](#)
[Room Reports](#)
[Cage Reports](#)
[Cage Search](#)

SERVICES

[Service Search](#)
[Service Request](#)
[Service Reports](#)

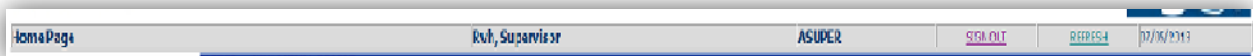
Home Page Sections

The Darwin Web Application **Home Page** consists of the following sections;

- Grey stripe across the top of the window;
- Table of contents, at the left of the home page
- Applications and Options area.

Grey Information Bar

Your current location, your name, your security role, the SIGN OUT and the REFRESH link buttons, and the current date.



In the example given, the current location is **Home Page**, the office user's name is **Supervisor, Rvh**, the security role is **ASUPER**, and the current date is **July 5, 2013**.

Table of Contents (TOC)

Clicking an item in the **TOC** takes you to the corresponding portion of your home page.

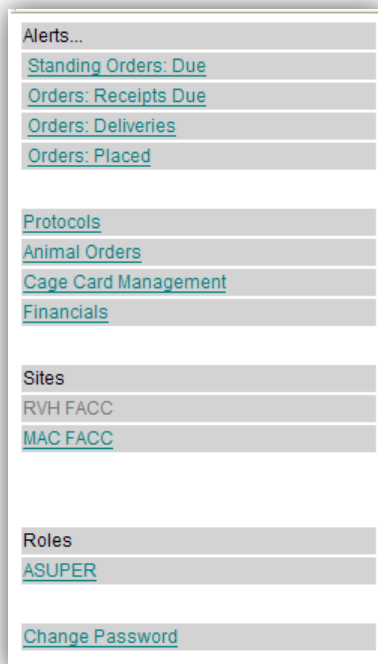


Table of contents (TOC) is located on the left hand side of the home page.

When you click on an item in the TOC, you will proceed to the corresponding section of your home page.

The TOC consists of 4 main sections:

Alerts:

In the example given above, on Supervisor Rvh's home page, the following alerts are displayed:

- Alerts – NEW ANIMAL ORDERS
- Alerts – ANIMAL STANDING ORDERS DUE
- Alerts – DELIVERY SCHEDULE
- Alerts – PLACED ORDERS
- Alerts – INCOMING STANDING ORDERS SHIPMENTS

Options:

- Protocols
- Animal Orders
- Animal Husbandry (CENSUS)
- Financials

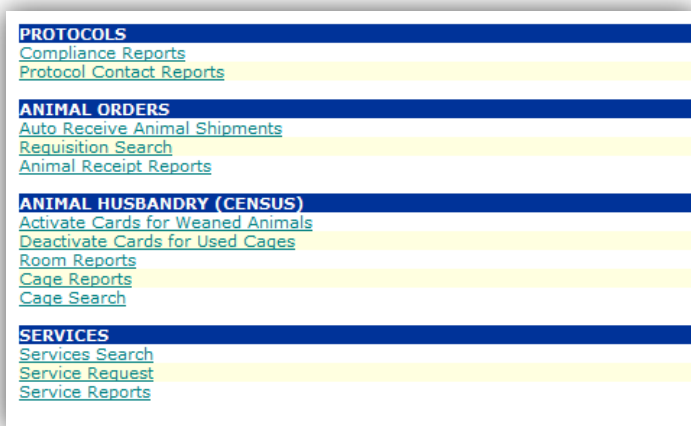
Sites: section appears if you belong to more than one site.

Roles: section appears if you have permissions to more than one role. It displays all roles assigned to you. If you are assigned only one role, you will not see the Roles in the TOC. In the given example, Supervisor Rvh is assigned three roles: the Animal Facility Supervisor (ASUPER, his current role) Principal Investigator (PI) and PI Accounting (PIACCTG) roles.

Change Password: This is an inactive function. For more information about the McGill short username and McGill Password, go to <http://kb.mcgill.ca/kb/?ArticleId=1025>

Applications and Options Area

The image below illustrates what the Applications and Options area looks like.



The blue stripes – **Protocols, Animal Orders, Animal Husbandry (CENSUS),** and **Services** are the various applications, under which a user can have some or all of the related options assigned by the Darwin Web Application administrator in the Darwin Web Expert application.

Introduction to Shared Housing

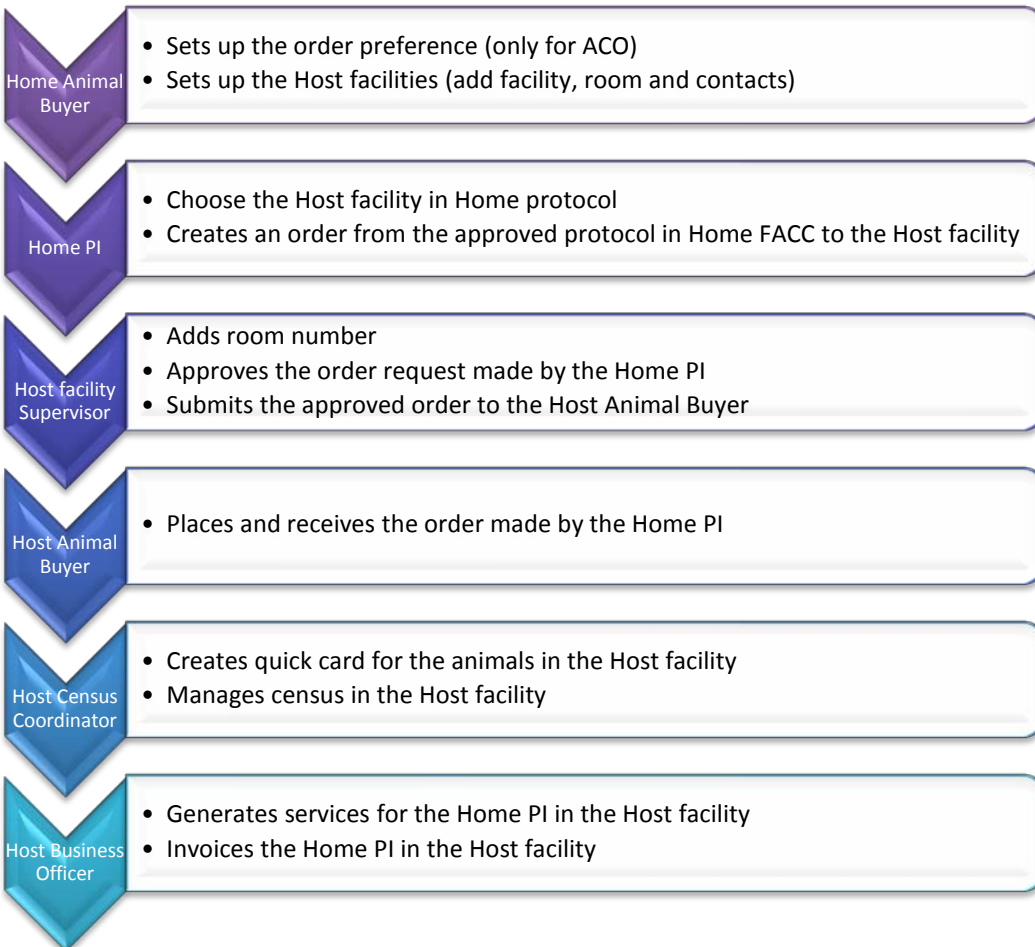
Shared housing occurs when a PI belongs to a Home FACC (Site) and wants to house animal in a Host(s) facilities. The shared housing process involves many people in this order;



Note

Defining “**Home**” and “**Host**” role in this document:

- **Home** is where the protocol originates.
- **Host** refers to the shared housing.



Shared Housing is a customized function. Certain applications may differ from the usual Darwin process. Customized instructions are specified in the applicable sections.

Animal Orders

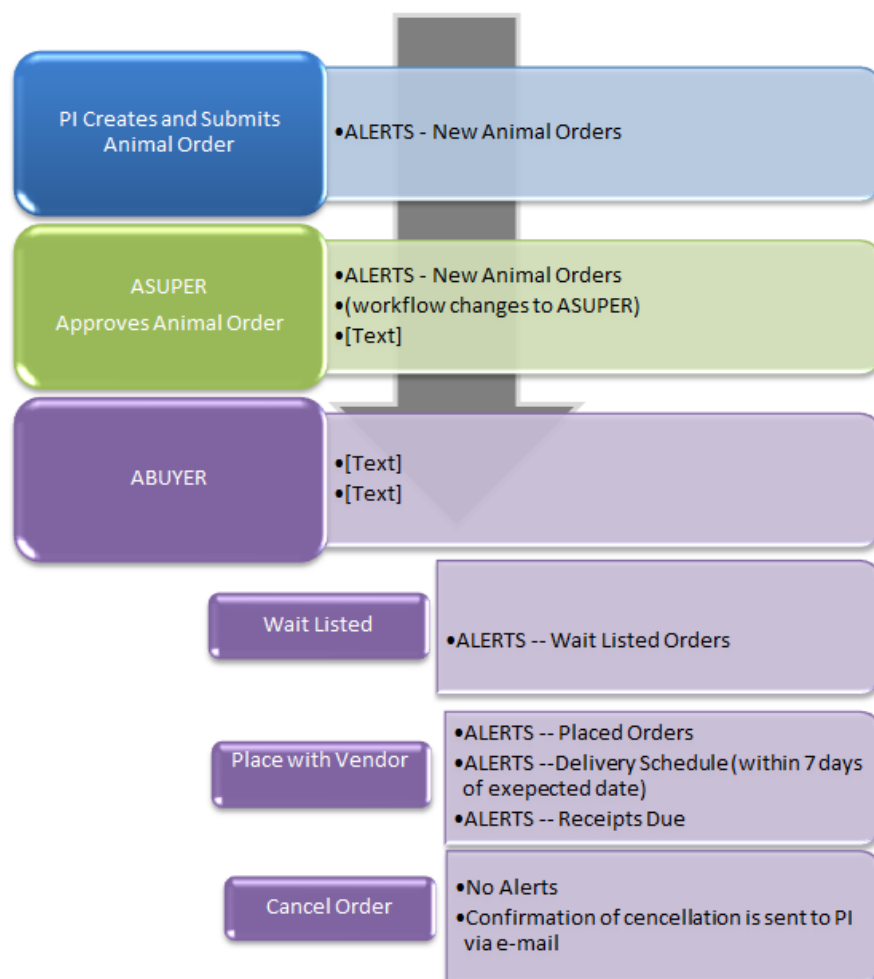
The animal order can be created either by the PI, the PI group's member or the Animal Buyer. The workflow will be slightly different depending on who initiates the order.

Animal order requests can be submitted to the Animal Facility only for an approved protocol and if the animal usage has not exceeded the authorized amount.

This feature only applies to orders deriving from an approved vendor source:

- **Non-Commercial Sources:** customary processes are maintained for animal acquisition requests from non-commercial or non-approved vendor sources.
- **Wildlife:** Does not apply to Darwin Animal Orders. The use of field animals will be reported at the renewal phase of the protocol.

Workflow Process for Animal Order



After the PI or ABUYER creates and submits an order request, the system will assign an order number. The **Alerts -- New Animal Orders** section of the Darwin home page notifies the PI, Animal Facility Supervisor, and Animal Buyer of the new order and keeps them informed as to the order workflow status. The workflow status is created and displayed ONLY when a PI starts an order. It will not display if the order is placed by the Animal Buyer.

In the example given below, the order has been created by the PI, but not yet approved by the Animal Facility Supervisor (the workflow status says Animal Facility Supervisor).

ALERTS -- NEW ANIMAL ORDERS									
Source	Vendor	Other Source	Order #	Order Date	Requestor	Protocol	Species	Work Flow Status	Placed At
Vendor Purchases	Harlan		V007823	01/07/2013	Investigator1, Rvh	2012-7267	Mice	Facility Supervisor	
Vendor Purchases	Charles River Laboratories		V007824	01/07/2013	Investigator1, Rvh	2013-7276	Mice	Animal Buyer	
Vendor Purchases	Harlan		V007825	01/07/2013	Investigator1, Rvh	2013-7276	Rats	Facility Supervisor	

When the order is approved by the Animal Facility Supervisor, its workflow status is changed to Animal Buyer.

ALERTS -- NEW ANIMAL ORDERS									
Source	Vendor	Other Source	Order #	Order Date	Requestor	Protocol	Species	Work Flow Status	Placed At
Vendor Purchases	Harlan		V007823	01/07/2013	Investigator1, Rvh	2012-7267	Mice	Facility Supervisor	
Vendor Purchases	Charles River Laboratories		V007824	01/07/2013	Investigator1, Rvh	2013-7276	Mice	Animal Buyer	
Vendor Purchases	Harlan		V007825	01/07/2013	Investigator1, Rvh	2013-7276	Rats	Facility Supervisor	

When the Animal Buyer places the order with the vendor, the order moves to **Alerts -- Placed Animal Orders**. It will also appear in the **Alert--Delivery Schedule** if within 7 days of the delivery date. On the delivery date, they automatically move to the **Alerts -- Animal Receipts Due** section. When the order is received, it no longer appears in the alerts.

ALERTS -- NEW ANIMAL ORDERS									
Source	Vendor	Other Source	Order #	Order Date	Requestor	Protocol	Species	Work Flow Status	Placed At
Vendor Purchases	Harlan	1	V007823	01/07/2013	Investigator1, Rvh	2012-7267	Mice	Facility Supervisor	
Vendor Purchases	Charles River Laboratories		V007825	01/07/2013	Investigator1, Rvh	2013-7276	Rats	Facility Supervisor	

ALERTS -- ANIMAL RECEIPTS DUE														
Source	Vendor	Other Source	Vendor Loc	Expected	Order #	Item #	Qty	Species	Strain	Age	Weight	Sex	Location	Room
Vendor Purchases	Charles River Laboratories			11/09/2012	V007798	1	10	Rats	Zucker			M	RVH Animal Facility-TEST	TestA
Vendor Purchases	Charles River Laboratories	4		11/29/2012	V007801	2	20	Rats	Zucker			F	RVH Animal Facility-TEST	TestA
Vendor Purchases	Charles River Laboratories			12/11/2012	V007804	1	2	Rats	ZDF	6 weeks	15g	M	RVH Animal Facility-TEST	TestB

ALERTS -- DELIVERY SCHEDULE														
Expected	Source	Vendor	Other Source	Vendor Loc	Order #	Item #	Requestor	Phone	Qty	Species	Strain	Age	Weight	Sex
01/08/2013	Vendor Purchases	Harlan			V007816	1	Morocutti, Bruna	514.398.3236	5	Mice	C57			M
01/10/2013	Vendor Purchases	Charles River Laboratories	3		V007821-1	1	Investigator1, Rvh	514111111x11111	8	Mice	wild-type	10 weeks	10-15g	M
01/10/2013	Vendor Purchases	Charles River Laboratories			V007824	1	Investigator1, Rvh	514111111x11111	11	Mice	wild-type		10-15g	M
01/14/2013	Vendor Purchases	Charles River Laboratories			V007822-1	1	Abuyer, Rvh	111-1111	9	Rats	Zucker		200g	M

ALERTS -- PLACED ORDERS									
Source	Vendor	Other Source	Order #	Order Date	Placed On	Species	Requestor	Protocol	
Vendor Purchases	Charles River Laboratories		V007798	11/08/2012	11/08/2012	Rats	Flinstone, Fred	2012-7253	
Vendor Purchases	Charles River Laboratories		V007801	11/28/2012	11/28/2012	Rats	Flinstone, Fred	2012-7253	
Vendor Purchases	Charles River Laboratories	2	V007821-1	01/07/2013	01/07/2013	Mice	Investigator1, Rvh	2012-7267	
Vendor Purchases	Charles River Laboratories		V007822-1	01/07/2013	01/07/2013	Rats	Abuyer, Rvh	2013-7276	
Vendor Purchases	Charles River Laboratories		V007824	01/07/2013	01/07/2013	Mice	Investigator1, Rvh	2013-7276	
Vendor Purchases	Charles River Laboratories		V007804	12/10/2012	12/10/2012	Rats	Presley, Elvis	2012-7256	
Vendor Purchases	Harlan		V007816	12/14/2012	01/07/2013	Mice	Morocutti, Bruna	2012-7256	

Animal Order Request for Shared Housing

Here is the summary of the animal order workflow for Shared Housing:



Scenario:

- The MAC FACC is the Home Site and the RVH Animal Facility – Test is the Host Facility.
- Mac Investigator2 is the Home Principal Investigator at the MAC. On a protocol, he will see Housing Locations created by the Host facility (RVH) ABUYER at MAC called “RVH Animal Facility used by MAC”

The Home Principal Investigator (*Mac Investigator2*) must choose the shared housing facility he wants to house the animal in (*RVH Animal Facility used by MAC*).

Housing Location Information

This is essentially to determine which animal facility will be receiving your animal orders. If housing in your laboratory but ordering animals, please choose the name of the animal facility which will place your orders and receive the animals.

For field type studies or if no housing is involved, select "Not Applicable".

Principal Investigator	Investigator2, Mac
Protocol Application Number	2013-7275
Document Type	New
Protocol Year	1
Species Name	Mice
Facility Name	

* Required Fields

- Downtown Stewart Biology Phytotron Facility
- Downtown Stewart Biology Research Lab used by MAC
- Mac Campus Avian Conservation Centre
- Mac Campus Dairy Complex
- Mac Campus Field Study
- Mac Campus Large Animal Research Unit
- Mac Campus Poultry Complex
- Mac Campus Research Lab
- Mac Campus Show Arena
- Mac Campus Swine Complex
- McIntyre Animal Facility used by MAC
- Other Country
- RVH Animal Facility used by MAC-TEST**
- Redpath Museum Research Lab
- Stewart Biology Animal Facility used by MAC

When the protocol is approved, the Housing Location named herein will be available for orders. For this protocol, the MAC PI will be able to order animals to be housed in MAC or RVH facilities used for Outside Housing by MAC.

Create New Animal Order (multiple sources) Investigator2, Mac PI SL

Create New Animal Order > Order Line Detail

Enter all information pertinent to species, strains, age, weight, sex, etc.

Order Info

Order Number	New
Order Date	01/11/2013
Principal Investigator	Investigator2, Mac
Protocol No	2012-7273
Expiration Date	12/01/2015
Species	Mice

Item Information

Order Details (ex: pregnant, with litter, embryo stage) should be specified in the line item "Remarks" field.

Vendor requests should be specified in the "Notes to Vendor" section.

Housing instructions (ex: special needs, room number) should be specified in the "Notes to Technician" section.

Delivery Date	Qty	Per Cage	Category of Invasiveness	Strain	Weight	Age	Sex	Facility	Per Diem Account	Remarks	Purchase Account
	0	0					Male				
	0	0					Male	Mac Campus SARU Facility-TEST			
	0	0					Male	RVH Animal Facility used by MAC-TEST			
	0	0					Male				

Add Line Items

After the PI creates and submits an order request, the system will assign an order number. An e-mail notification will be issued to the ABUYER and ASUPER and the Alerts -- **New Animal Orders** on the Darwin home page for the HOME FACC site.

Home Page Abuyer, Rvh MAC: ABUYER

Alerts... [Orders: New](#)

Animal Orders

Sites

MAC FACC

RVH FACC

Roles

ASUPER

Change Password

ALERTS -- NEW ANIMAL ORDERS

Source	Vendor	Other Source	Order #	Order Date	Requestor	
Vendor Purchases	Charles River Laboratories		V007826	01/11/2013	Investigator2, Mac	2012

ANIMAL ORDERS

Create a New Animal Order

Create a New Standing Order

Requisition Reports

Vendor Reports

Create a New Animal Order From Template

Auto Receive Animal Shipments

Requisition Search

Setup Vendor

Setup Species

Setup Facilities & Rooms

Standing Order Search

Animal Receipt Reports

Reconcile Vendor Invoices

Host facility ABUYER

Home FACC site

Note

The Host Animal Buyer and Animal Facility Supervisor will only be able to view the alerts pertaining to the shared housing host facility in the protocol's Home FACC site home page.

To view the alerts for the shared housing, the Host Animal Facility Supervisor must switch to the Home site from the Table of Contents (TOC) of Darwin home Page.

Approval of Order Request

The Animal Facility Supervisor role is to assign a building and room number where housing is requested. The order request is displayed in the **Alerts -- New Animal Orders** section.

Note

The Abuyer can override the ASUPER workflow. However, the very first order of a protocol must respect the **PI ➔ ASUPER ➔ ABUYER** workflow.

1. Click the order number to select and view the order.

Rvh, Supervisor					ASUPER		SIGN OUT	REFRESH	07/05/2
ALERTS -- NEW ANIMAL ORDERS									
Source	Vendor	Other Source	Order #	Order Date	Requestor	Protocol	Species	Work Flow Status	
Vendor Purchases	Charles River Laboratories		V007921	07/03/2013	Rvh, Investigator	2012-7267	Mice	Facility Supervisor	
Vendor Purchases	Jackson Laboratories		V007922	07/03/2013	Rvh, Investigator	2012-7267	Mice	Facility Supervisor	
Vendor Purchases	Charles River Laboratories		V007923	07/03/2013	Rvh, Investigator	2012-7267	Rats	Facility Supervisor	
Vendor Purchases	Charles River Laboratories		V007924	07/03/2013	Morocutti, Bruna	2012-7267	Mice	Facility Supervisor	

The **Create New Animal Order > Order Line Detail** page opens.

2. Enter the assigned/ confirmed Room number in the **Room No.** field

Note

Room number must exactly match the Room set up in the Master List (Facilities and room Setup). This field is Case-sensitive. Use of the alternate letter case will have implications later in the process and you will be unable to create cage cards.

Note

If the Order Requisition submitted by the PI derived from an Order Template, the room number from the original requisition will display in the Room field by default. In this case, confirm or revise the room number.

Note

The PI has the option of requesting the preferred housing location in the Requested Housing Room # field.

Create New Animal Order > Order Line Detail

Enter all information pertinent to species, strains, age, weight, sex, etc.

Order Info

Order Number	V007921
Order Date	07/03/2013
Principal Investigator	Rvh, Investigator
Protocol No	2012-7267
Expiration Date	12/01/2015
Species	Mice

Item Information

Order Details (ex: pregnant, with litter, embryo stage) should be specified in the line item "Remarks" field.

Vendor requests should be specified in the "Notes to Vendor" section.

Housing instructions (ex: special needs, room number) should be specified in the "Notes to Technician" section

Select	Item #	Delivery Date	Qty	Per Cage	Category of invasiveness	Strain	Weight	Age	Sex	Facility*	Room No	Per Diem	Per Diem Account	Remarks	Requested Housing Room #	Purchase Account
☐	1	07/04/2013	10	5	D	wild-type			Male	RVH Animal Facility-TEST			1114		TestA	1114

[Split Room](#)

Confirm housing location

Animal Source Info

Animal Source	Vendor Purchases
---------------	------------------

Vendor Info

Select commercial vendor from approved list of vendors, and write specific notes or instructions, if any, for this vendor

Vendor Name	Charles River Laboratories
Notes to Vendor	

Order Notes

Notes to Animal Technicians	
-----------------------------	--

Requester Info

Confirm phone number and e-mail id of person to notify about this order

Requestor	Rvh, Investigator
Requestor Phone	5141111111x11111
Requestor Email	investigator.rvh@mcgill.ca

CAUTION! - Do not click the buttons multiple times. Multiple clicks will cause creating multiple orders. Wait until the submit process completes.

3. Additional housing rooms can be assigned by clicking **Split Room** (for further actions, follow the on-page instructions) and then approve it by clicking Submit to Animal Buyer.
 - a. Select the item from the **Item Information** section and click **Split Room**.

Item Information

Order Details (ex: pregnant, with litter, embryo stage) should be specified in the line item "Remarks" field.

Vendor requests should be specified in the "Notes to Vendor" section.

Housing instructions (ex: special needs, room number) should be specified in the "Notes to Technician" section

Select	Item #	Delivery Date	Qty	Per Cage	Category of invasiveness	Strain	Weight	Age	Sex	Facility*	Room No	Per Diem	Per Diem Account	Remarks	Requested Housing Room #	Purchase Account
☒	1	07/04/2013	10	5	D	wild-type			Male	RVH Animal Facility-TEST	TestA		1114		TestA	1114

[Split Room](#)

The **Create New Animal Order>Split Room** page opens.

- b. In the **Split Rooms Information** section, complete the field for the animals in the alternate location.

Note 

Room number must exactly match the Room set up in the Master List (Facilities and room Setup). This field is Case-sensitive. Use of the alternate letter case will have implications later in the process and you will be unable to create cage cards.

Create New Animal Order > Split Room

Order Info

Order Number	V007921
Order Date	07/03/2013
Principal Investigator	Rvh, Investigator
Protocol No	2012-7267
Expiration Date	12/01/2015
Species	Mice

Item Information

Order Details (ex: pregnant, with litter, embryo stage) should be specified in the line item "Remarks" field.

Vendor requests should be specified in the "Notes to Vendor" section.

Housing instructions (ex: special needs, room number) should be specified in the "Notes to Technician" section

Item #	Delivery Date*	Qty*	Per Cage*	Category of invasiveness*	Strain*	Weight	Age	Sex	Facility*	Room No	Per Diem*	Per Diem Account*	Remarks	Requested Housing Room #	Purchase Account
1	07/04/2013	10	5	D	wild-type			M	RVH Animal Facility-TEST	TestA		1114		TestA	1114

Split Rooms Information

Enter the quantity of animals you wish to move and the facility and room to move them to

Qty*	Facility*	Room No*
5	RVH Animal Facility-TEST	TestC

Animal Source Info

Animal Source	Vendor Purchases
---------------	------------------

Vendor Info

Select commercial vendor from approved list of vendors, and write specific notes or instructions, if any, for this vendor

Vendor Name	Charles River Laboratories
Notes to Vendor	

Requester Info

Confirm phone number and e-mail id of person to notify about this order

Requestor	Rvh, Investigator
Requestor Phone	5141111111x11111
Requestor Email	investigator.rvh@mcgill.ca

- c. Click save **Split Room and Continue**. A new item is created in the **Item Information** section of the **Create New Animal Order>Order Line Detail** page.

Create New Animal Order > Order Line Detail

Enter all information pertinent to species, strains, age, weight, sex, etc.

Order Info

Order Number	V007921
Order Date	07/03/2013
Principal Investigator	Rvh, Investigator
Protocol No	2012-7267
Expiration Date	12/01/2015
Species	Mice

Item Information

Order Details (ex: pregnant, with litter, embryo stage) should be specified in the line item "Remarks" field.

Vendor requests should be specified in the "Notes to Vendor" section.

Housing instructions (ex: special needs, room number) should be specified in the "Notes to Technician" section

Select	Item #	Delivery Date	Qty	Per Cage	Category of Invasiveness	Strain	Weight	Age	Sex	Facility	Room No	Per Diem	Per Diem Account	Remarks	Requested Housing Room #	Purchase Account
☐	1	07/04/2013	5	5	D	wild-type			Male	RVH Animal Facility-TEST	TestA		1114		TestA	1114
☐	2	07/04/2013	5	5	D	wild-type			Male	RVH Animal Facility-TEST	TESTC		1114		TestA	1114

Split Room

4. Once the room assignment is complete, click **Submit to Animal Buyer**. The workflow status on the home page **Alerts -- New Animal Order Alerts** is changed to Animal Buyer.

ALERTS -- NEW ANIMAL ORDERS										
Source	Vendor	Other Source	Order #	Order Date	Requestor	Protocol	Species	Work Flow Status	Placed At	
Vendor Purchases	Harlan		V007823	01/07/2013	Investigator1, Rvh	2012-7267	Mice	Facility Supervisor		
Vendor Purchases	Charles River Laboratories		V007824	01/07/2013	Investigator1, Rvh	2013-7276	Mice	Animal Buyer		
Vendor Purchases	Harlan		V007825	01/07/2013	Investigator1, Rvh	2013-7276	Rats	Facility Supervisor		

Note

If the supervisor takes no action on the order request, its workflow status will say Animal Facility Supervisor. However, the Animal Buyer may still place the order. Therefore, the supervisor should notify the PI and the Animal Buyer of any decision to cancel or hold the order

Approval of Order Request for Shared Housing

To view the alerts for the shared housing, the Host Animal Facility Supervisor must switch to the Protocol's Home FACC site from the Table of Contents (TOC) of Darwin Home Page.

1. As the **Host Facility ASUPER (Rvh Asuper)**, select the Home FACC site (MAC) from the Table of Contents.

Home Page

Alerts... Orders: New Animal Orders Sites MAC FACC RVH FACC Change Password

ALERTS -- NEW ANIMAL ORDERS

Source	Vendor	Other Source	Order #	Order Date	Requestor	Protocol
Vendor Purchases	Charles River Laboratories		V007826	01/11/2013	Investigator2, Mac	2012-7273

ANIMAL ORDERS
Auto Receive Animal Shipments
Requisition Search
Animal Receipt Reports

Host facility ASUPER

Home FACC site

Home FACC site: Role

The example above shows that the Host facility ASUPER (*Rvh Asuper*) from the RVH changed his role to MAC:ASUPER and the order request is displayed in the ALERTS – NEW ANIMAL ORDERS

- Follow instructions as described in [Approval of Order Request](#).
- Indicate “TBD” in the **Room Number** Field on the **Create New Animal Order>Order Line Detail** page, then click on Submit to Animal Buyer.

Split Rooms does not apply for Shared Housing order requests

Note

Noting “TBD” as a room number is a virtual process performed in the protocol Home site. The information will be adjusted further on in the animal order process.

When the supervisor approves the order, it remains in the **Alerts – New Animal Orders** section on their home page with the workflow changed to the Animal Buyer status.

ALERTS -- NEW ANIMAL ORDERS										
Source	Vendor	Other Source	Order #	Order Date	Requestor	Protocol	Species	Work Flow Status	Placed At	
Vendor Purchases	Harlan		V007823	01/07/2013	Investigator1, Rvh	2012-7267	Mice	Animal Buyer		
Vendor Purchases	Harlan		V007823	01/07/2013	Investigator1, Rvh	2013-7276	Rats	Facility Supervisor		

The Animal Buyer will process the order by assigning the perdiems and choosing one of the following options:

- **Save Order Info** – Save order info to wait for the vendor’s confirmation or if you process involves entering the animal purchase information since the requisition is editable at this stage. The order remains in the **Alerts -- New Animal Orders** section.
- **Place with Vendor** – Place the order with the vendor. The order move to **Alerts – Placed Orders** and, if expected within the next 7 days it will also appear in the **Alerts-- Delivery Schedule**. The PI will receive also receive an alerts on his Home page as well as an e-mail notification.
- **Wait Listed** – Wait-list the order. The order is displayed on **Alert—Wait Listed Orders**. The process can be continued at a later time.

- **Cancel Order** – Cancels the order when requested by the PI (the order is no longer displayed in any alert, and the PI is notified of the order cancellation via email). This is the final step to the cancellation process and must be completed by the ABUYER in for register adjustment to occur.
- **Cancel & Return to Home Page** – Cancel all the changes you have just made to the order and return to your home page. This will not change the status of the order Requisition.

Note

The Abuyer can override the ASUPER workflow. However, the very first order of a protocol must respect the **PI ➤ ASUPER ➤ ABUYER** workflow.

Order is on Delivery Schedule

Animal orders are displayed in the **Alerts -- Delivery Schedule** section when they are placed with the vendor. (The **Alerts -- Delivery Schedule** section is assigned to the Animal Buyer, Animal Facility Supervisor, and Receiving Technician).

ALERTS -- DELIVERY SCHEDULE																		
Expected	Source	Vendor	Other Source	Vendor Loc	Order #	Item #	Requestor	Phone	Qty	Species	Strain	Age	Weight	Sex	Location	Room	Per Diem	Placed On
01/10/2013	Vendor Purchases	Charles River Laboratories			V007821-1	1	Investigator1, Rvh	5141111111x11111	8	Mice	wild-type	10 weeks	10-15g	M	RVH Animal Facility-TEST	TestA	Test Mouse Conventional Cage	01/07/2013
01/10/2013	Vendor Purchases	Charles River Laboratories			V007824	1	Investigator1, Rvh	5141111111x11111	11	Mice	wild-type		10-15g	M	RVH Animal Facility-TEST	TestA	Test Mouse Conventional Cage	01/07/2013
01/14/2013	Vendor Purchases	Charles River Laboratories			V007822-1	1	Abuyer, Rvh	111-1111	9	Rats	Zucker		200g	M	RVH Animal Facility-TEST	TestB	Test Rat Conventional Cage	01/07/2013

On the scheduled delivery date, the orders displayed in the **Alerts -- Delivery Schedule** section will automatically move to the **Alerts -- Animal Receipts Due**. Once an order is received, it no longer appears in any alert. To see more definition of the animal orders alerts, go to [Appendix A: Animal Order Alerts](#)

Order is on Delivery Schedule for Shared Housing

As per regular animal order process, alerts will display in the Protocol Home FACC Home Page.

Orders Cancelled by the PI

Before the shipment arrives, the PI can submit a request to cancel the order by clicking on the **Request to Cancel Order** button on the order requisition. If the request is placed in time, the cancellation process must be confirmed by the Animal Buyer.

Note 

This application will cancel the entire order requisition. For cancellation of an individual shipment on a multi-item requisition, see [Cancel Shipment](#). PI cancellation requests for an individual line item on multi-item requisition must be communicated to the ASUPER or ABUYER via processes outside of Darwin.

The ASUPER and ABUYER receive the **CANCELLED BY PI-ALERT** on the home page as well as an e-mail notification.

ALERTS -- ORDER CANCELLATION REQUESTED BY PI				
Source	Vendor	Order #	Requestor	Order Date
Vendor Purchases	Jackson Laboratories	V007922	Rvh, Investigator	07/03/2013

OPTIONAL: The ASUPER can submit the request for cancellation to the ABUYER:

- Select the order from the **Alerts –Order Cancellation Requested by PI** on the home page.

ALERTS -- ORDER CANCELLATION REQUESTED BY PI				
Source	Vendor	Order #	Requestor	Order Date
Vendor Purchases	Jackson Laboratories	V007922	Rvh, Investigator	07/03/2013

- The **Create New Animal Order>Order Line Detail** page opens. Validate the information and click **Submit to Animal Buyer**




Create New Animal Order (multiple sources)
Rvh, Supervisor
ASUPER
SIGN OUT
HOME
07/05/2013

Create New Animal Order > Order Line Detail

Enter all information pertinent to species, strains, age, weight, sex, etc.

Order Info

Order Number	V007922
Order Date	07/03/2013
Principal Investigator	Rvh, Investigator
Protocol No	2012-7267
Expiration Date	12/01/2013
Species	Mice

Item Information

Order Details (ex: pregnant, with litter, embryo stage) should be specified in the line item "Remarks" field.

Vendor requests should be specified in the "Notes to Vendor" section.

Housing instructions (ex: special needs, room number) should be specified in the "Notes to Technician" section.

Sub Item	Item	Delivery Date	Qty	Per Page	Category of Assignment	Strain	Weight/Age	Sex	Facility	Room No	Per Used Account	Remarks	Requested Housing Room	Purchase Account
0	1	10/15/2013	30	30	sub-type	Male			RVH Animal Facility-TEST		1114	788A	1114	

Split Room

Animal Source Info

Animal Source/Vendor Purchases

Vendor Info

Select commercial vendor from approved list of vendors, and write specific notes or instructions, if any, for this vendor

Vendor Name	Jackson Laboratories
Notes to Vendor	

Order Notes

Notes to Animal Technician

Requester Info

Confirm phone number and e-mail id of person to notify about this order

Requestor	Rvh, Investigator
Requestor Phone	5141111111x11111
Requestor Email	investigator.rvh@mcgill.ca

CAUTION! - Do not click the buttons multiple times. Multiple clicks will cause creating multiple orders. Wait until the submit process completes.

Submit to Animal Buyer
Cancel & Return to Home Page

* Required Fields

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39200 Civic Center Drive, Suite 230
Fremont, CA 94555
Phone: 510-744-2901 Fax: 510-744-2904
www.nthcs.com

Orders Cancelled by the PI for Shared Housing

As per regular animal order process, alerts will display in the Protocol Home FACC Home Page.

Process Received Shipment

Prior to receiving the animals in Darwin, the Animal Buyer will print the cage cards. The receiving process activates those cards so we will tear-off and discard the activation strip.

Every animal facility will have their individual process on how the shipment is received and how the shipment information will get to the ASUPER/ABUYER. Once the ASUPER/ABUYER gets information about the shipments for the day, he/ she can enter the information in the Darwin web application.

Process Received Shipment

1. From the Darwin home page, select an order from the **Alerts -- Animal Receipts Due** or **Alerts -- Delivery Schedule** .The **Receive Shipments > Choose Receipt Option** page appears.

Receive Shipments > Choose Receipt Option

Choose receipt option for this shipment:

- **Received as Ordered:** Animals received as ordered, same quantity, delivery date and specs
- **Partial Shipment Received:** Number of animals received is less than what was ordered
- **Additional Animals Received:** Vendor shipped more animals than ordered
- **Shipment did not Arrive:** Expected shipment did not arrive on due date
- **Shipment Cancelled:** Shipment cancelled by PI, Buyer or Vendor

Receive Options

Order Number: V007798

Shipment receipt option:

Item Information

Order Details (ex: pregnant, with litter, embryo stage) should be specified in the line item "Remarks" field.

Vendor requests should be specified in the "Notes to Vendor" section.

Housing instructions (ex: special needs, room number) should be specified in the "Notes to Technician" section

Item #.	Delivery Date	Qty	Per Cage	Category of Invasiveness	Strain	Weight	Age	Sex	Facility	Room No.	Per Diem	Per Diem Account	Remarks	Purchase Account
1	11/09/2012	10	5A		Zucker			Male	RVH Animal Facility-TEST		Test Rat Conventional Cage	6789		6789

Order Info

Order Number: V007798

Order Date: 11/08/2012

Principal Investigator: Flinstone, Fred

Protocol No: 2012-7253

Expiration Date: 11/01/2015

Species: Rats

Vendor Info

Select commercial vendor from approved list of vendors, and write specific notes or instructions, if any, for this vendor

Vendor Name: Charles River Laboratories

Notes to Vendor:

Purchase Order Number:

Vendor Information:

Requester Info

Confirm phone number and e-mail id of person to notify about this order

Requestor: Flinstone, Fred

Requestor Phone: 398-4567

Requestor Email: fred.flinstone@mcgill.ca

Order Notes

Notes to Animal Technicians:

Shipment Information:

2. Choose one of the **Shipment receipt options**:

The screenshot shows a web form titled "Receive Options". It contains a table with two rows: "Order Number" with value "V007798" and "Shipment receipt option" which is a dropdown menu. The dropdown menu is open, showing five options: "Received as Ordered", "Partial Shipment Received", "Additional Animals Received", "Shipment did not Arrive", and "Cancel Shipment". A "Continue" button is located below the table. To the left of the table is a link labeled "Item Information".

Detailed information for the individual process is described in the succeeding sections.

Process Received Shipment for Shared Housing

- The requisition data is stored on the Home FACC site. Therefore, ASUPER must switch to the protocol's Home site from the Table of Contents (TOC) of Darwin Home Page to process received Shipments.
- Since the facility is NOT barcoded, the Animal Buyer can receive the animals without printing the cage cards.
- Cage cards are generated by the ACCOORD role using the Darwin Desktop Quick Card function. Refer to [Darwin for the Animal Census Coordinator Office User](#) manual)
- Shipment Receipt is done as per regular process

Received as Ordered

A shipment received as ordered means that the animals received as ordered: same quantity, and delivery date. To proceed with this shipment option:

1. From **Receive Shipments > Choose Receipt Option** page, select **Received as Ordered** and click the **Continue** button.

This screenshot is similar to the one above, but the "Received as Ordered" option in the dropdown menu is highlighted with a red rectangular box. The "Continue" button remains visible below the table.

2. From the **Receive Shipments > Update Receipt Information** page, complete the required fields .

Receive Options

Order Number: V007798

Shipment receipt option: Received as Ordered

Item Receipt Information

Item #	Expected	Received	Order Qty	Receipt Qty	Per Cage	Cages	Strain	Age	DOB	Weight
1	11/09/2012	11/09/2012	10	10	5	2	Zucker			

Item Receipt Notes

3. Click the **Continue** button to open the **Receive Shipments > Finish Item Receipt** page.
4. Click the **Finish this Item** button to complete the order receipt. Otherwise, click **Clear Form** or **Cancel & Return to Home Page**.

Partial Shipment Received

Partial shipment received means that the number of animals received is less than what was ordered. To proceed with this shipment option:

1. From the **Receive Shipments > Choose Receipt Option** page, select **Partial Shipment Received** and click **Continue**.

Receive Options

Order Number: V007798

Shipment receipt option: Partial Shipment Received

Continue

Item Information

Received as Ordered
Partial Shipment Received
 Additional Animals Received
 Shipment did not Arrive
 Cancel Shipment

2. From the **Receive Shipments > Update Receipt Information** page, review and edit the required fields * (i.e. Received Date and Receipt Quantity).

Receive Options

Order Number: V007798

Shipment receipt option: Partial Shipment Received

Item Receipt Information

Item #	Expected	Received	Order Qty	Receipt Qty	Per Cage	Cages	Strain	Age	DOB	Weight
1	11/09/2012	11/09/2012	10	10	5	2	Zucker			

Item Receipt Notes

3. For **Item Receipt Notes** section, enter notes related to the receipt of this shipment.

- Click the **Continue** button to open the **Receive Shipments > Finish Item Receipt** page.
- If you know the vendor will be shipping the rest of the animals, put a check on **Create backlog item for remaining animals** and change the new expected delivery date for the remaining animals.

If you wish to receive remaining animals at a later date, please fill in information in this section. If not, leave blank and shipment for remaining animals will be cancelled.

Create a backlog item for remaining animals	☒
Expected delivery date for remaining animals	01/15/2013

- If needed, check cage card records that you wish to discard.

Discard Cage Card List

Check cage card records that you wish to discard

Card ID		
0000150880	☐	
0000150881	☐	

- Click the **Finish this Item** button. Otherwise, click **Clear Form** or **Cancel & Return to Home Page**.

Note

If you have entered a new shipping date and discarded some of the cage cards, you will see this order # in the home page under **Alerts -- Placed Orders** and **Alerts -- Delivery schedule** (the order will appear in this alert if it is 7 days before the delivery date). Now, you will have to prepare the cage cards for this order and once the shipment has arrived, you will do the "[Process Received Shipment](#)" procedure.

Additional Shipment Received

Additional Animals Received means vendor shipped more animals than ordered. To proceed with this shipment option:

- From the **Receive Shipments > Choose Receipt Option** page, select **Additional Shipment Received** and click **Continue**.

Receive Options

Order Number: V007798

Shipment receipt option: *

Item Information

- Received as Ordered
- Partial Shipment Received
- Additional Animals Received**
- Shipment did not Arrive
- Cancel Shipment

- From the **Receive Shipments > Update Receipt Information** page, review and edit the required fields * (i.e. Received Date and Receipt Quantity).

Item Receipt Information

Item #	Expected	Received *	Order Qty	Receipt Qty *	Per Cage	Cages	Strain	Age	DOB
1	11/09/2012	11/09/2012	10	12	5	2	Zucker		

- Then click the **Continue** button to open **Receive Shipments > Finish Item Receipt** page .
- For the **Receive Additional Animals** section;
 - Indicate if additional cards are needed. If yes, check the **Print Additional Cards** checkbox
 - Indicate if the additional animals are to be debited from the protocol

Receive Additional Animals

Enter the number of additional cage cards needed, if any. If prompted, you may debit the protocol with the additional number of animals.

Number of additional cage cards needed (leave blank or 0 for none)

Debit protocol with additional animals? ☒

Print Additional Cards ☒

If the **Print Additional Cards** box is checked, you will need to go to Darwin Desktop to print additional cards. Use **Print Cage Cards > Choose Option** for **Print cards for selected Order Number and/or line item** and put a check on **Exclude cards that have been printed?**.

- Click the **Finish this Item** button. Otherwise, click **Clear Form** or **Cancel & Return to Home Page**.

Shipment did not Arrive

Shipment did not Arrive means that the expected shipment did not arrive on due date. To proceed with this shipment option:

- From the **Receive Shipments > Choose Receipt Option** page, select **Shipment did not Arrive** and click **Continue** to open **Receive Shipments > Update Receipt Information** page.

Receive Options

Order Number V007798

Shipment receipt option ▼ *

Continue

Item Information

- Received as Ordered
- Partial Shipment Received
- Additional Animals Received
- Shipment did not Arrive
- Cancel Shipment

- For **Item Receipt Information** section, enter the new expected date.

Item Receipt Information

Item #	Expected	Order Qty	Per Cage	Cages	Strain	Age	DOB	Weight	Sex	Facility	Room No	Per Diem	Barcoded?
1	11/09/2012	10	5	2	Zucker		//		Male	RVH Animal Facility-TEST		Test Rat Conventional Cage	Yes

Item Receipt Notes

- For **Item Receipt Notes** section, enter notes related to the receipt of this shipment.

Item Receipt Notes

Enter notes related to the receipt of this shipment. Include explanation of problems or changes to any of the specifications. If shipment is cancelled, please enter reason for cancellation in item receipt notes.

Receipt Notes

Weather is too warm to ship.

- Click the **Continue** button to open the **Receive Shipments > Finish Item Receipt** page.
- Click the **Finish this Item** button to update the information on the requisition. Otherwise, click **Clear Form** or **Cancel & Return to Home Page**.

Cancel Shipment

This option is recommended for the cancellation of select shipments from a multiple line item requisition. Each of these shipments will have the same Order # but different line Item #.

Note ⓘ

PI cancellation requests for an individual line item on multi-item requisition must be communicated to the ASUPER or ABUYER via processes outside of Darwin.

For Requisitions with Multiple Line Items:

The Animal Buyer will take the following steps to cancel the shipment:

1. From Animal Buyer Darwin home page, select an order from the **Alerts -- Animal Receipts Due** or **Alerts -- Delivery Schedule**.
2. From the **Receive Shipments > Choose Receipt Option** page, select **Cancel Shipment** and click **Continue**.

The screenshot shows the 'Receive Options' form. At the top, 'Order Number' is V007798. Below it, the 'Shipment receipt option' dropdown menu is open, displaying several options: 'Received as Ordered', 'Partial Shipment Received', 'Additional Animals Received', 'Shipment did not Arrive', and 'Cancel Shipment'. The 'Cancel Shipment' option is highlighted with a red border. To the left of the dropdown is a 'Continue' button. Below the dropdown is the 'Item Information' section.

3. From the **Receive Shipments > Update Receipt Information** page, you need to enter the reason for the order cancellation under the **Item Receipt Notes** section.

The screenshot shows the 'Item Receipt Notes' form. It includes a text area for entering notes. Above the text area, there is a instruction: 'Enter notes related to the receipt of this shipment. Include explanation of problems or changes to any of the specifications. If shipment is cancelled, please enter reason for cancellation in item receipt notes.' Below the instruction is a blue header for 'Receipt Notes' and a large text area for entering the notes. To the right of the text area are two small icons: a magnifying glass and a trash can.

4. Then click the **Continue** button to open the **Receive Shipments > Finish Item Receipt** page.
5. Click the **Finish this Item** button to update the information. Otherwise, click **Clear Form** or **Cancel & Return to Home Page**.



Note

The line item will be cancelled and non-editable.

A credit to the protocol register will apply for the number of animals for the cancelled item shipment

For Requisitions with Single Line Item:

Use of the **Cancel Order** option is recommended for single line item requisitions. In addition to cancelling the shipment, the Cancel Order option will also change the order requisition status to **"Cancelled"**. Refer to [Orders Cancelled by the PI](#)

If the order is only associated with one requisition line (Item #) and the shipment is cancelled from the **Receive Shipments > Choose Receipt Option** page, the status of the order is **"Placed"**. The order can be updated to **"Cancelled"** by performing a [Requisition Search](#). Before you perform this type of search make sure you know the order # and after you have found the order do the following:

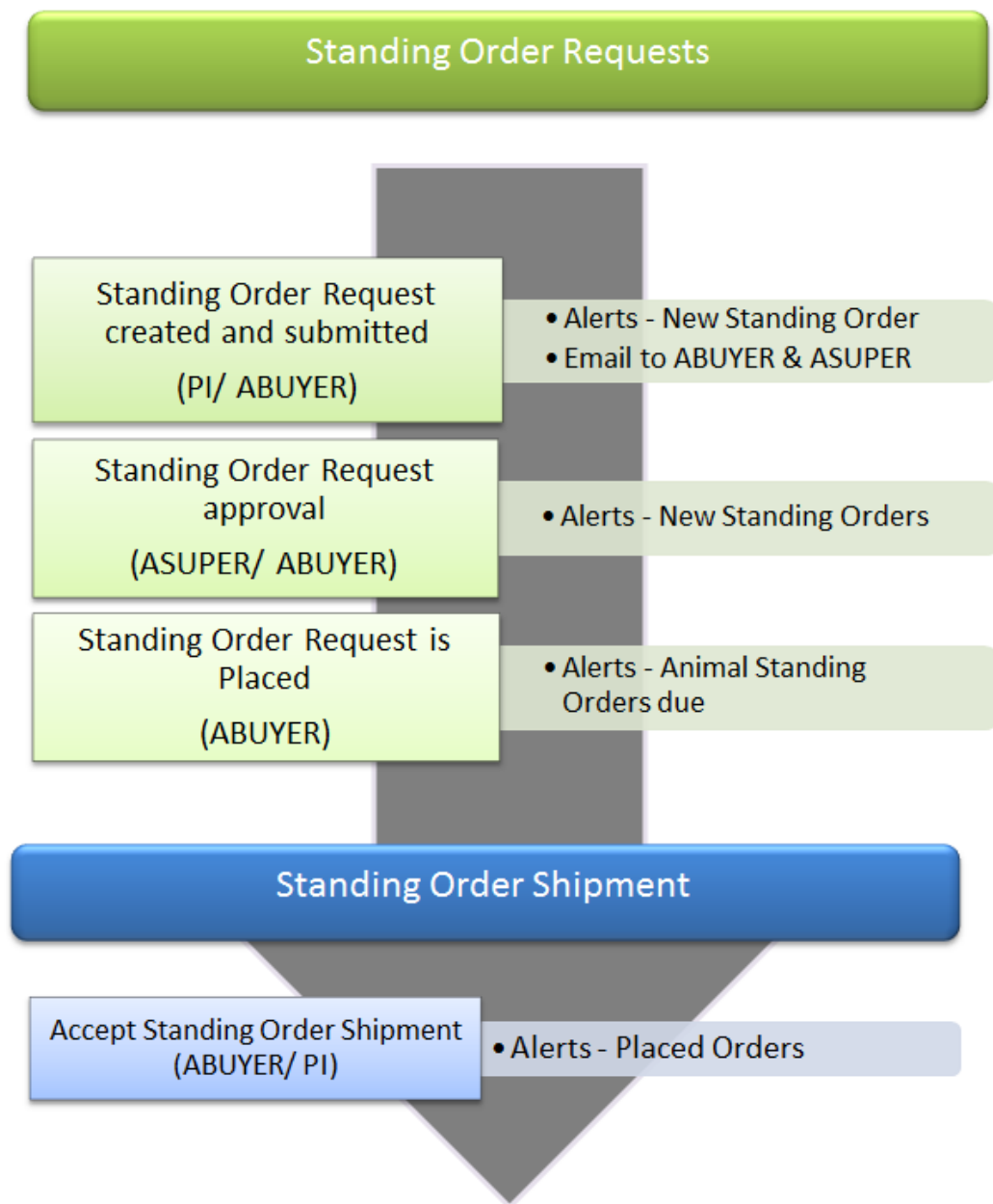
1. From the **Requisition Search Results** page, you will notice the Status is "Placed". Click the **Edit Requisition** button.
2. The **Create New Animal Order > Order Line Detail** page will appear. Click the **Cancel Order** button. This will change the status of the order from "Placed" to "Cancelled".

Standing Orders

With the standing order process, you can create an order with regularly recurring identical shipments.

The workflow for the standing order process is the same as creating regular [Animal Orders](#)

Workflow Process for Standing Orders



Animal Facility Supervisor Approves Standing Order Request

As with a regular order request, standing order requests appear on the Animal Facility Supervisor's home page in the **Alerts -- New Standing Orders** section with a workflow status of Animal Facility Supervisor when they are created and submitted by the PI.

After the PI initiates the creation of the standing order the Animal Facility Supervisor can select it from the **Alerts -- New Standing Orders** section for editing as necessary based on housing location and delivery date or to accept and approve it as is.

Select the order from the **Alerts -- New Standing Orders** section of your home page, make changes if necessary and click **Submit to Animal Buyer**.

Asuper, Rvh				RVH: ASUPER	SIGN OUT	REFRESH	01/07/2013
ALERTS -- NEW STANDING ORDERS							
Vendor	Order #	Order Date	Requestor	Protocol	Species	Work Flow Status	PI
Charles River Laboratories	V007822	01/07/2013	Abuyer, Rvh	2013-7276	Rats		Investigator1, Rvh

After submission, the order remains in the **Alerts -- New Standing Orders** section, with the ABUYER now showing in the workflow status.

Asuper, Rvh				RVH: ASUPER		SIGN OUT	REFRESH	01/07/2013
ALERTS -- NEW STANDING ORDERS								
Vendor	Order #	Order Date	Requestor	Protocol	Species	Work Flow Status		PI
Charles River Laboratories	V007822	01/07/2013	Abuyer, Rvh	2013-7276	Rats	Animal Buyer		Investigator1, Rvh

The ABUYER will continue the O\order process and place the order with the Vendor.

After the order is **Placed** with vendor, the order will moved to **Alerts -- Animal Standing Orders Due**

Note

The Animal Buyer can skip the Animal Facility Supervisor step by simply choosing the standing order request from the Alert when the workflow status is Animal Facility Supervisor. The Animal Buyer may edit the standing order requisition.

Animal Facility Supervisor Approves Standing Order Request for Shared Housing

To view the alerts for the shared housing, the Host Animal Facility Supervisor must switch to the Protocol's Home FACC site from the Table of Contents (TOC) of Darwin Home Page.

1. As the **Host Facility ASUPER** (*Rvh Asuper*), select the Home FACC site (*MAC*) from the Table of Contents.

The screenshot shows the Darwin Home Page interface. At the top, the user is logged in as 'Asuper, Rvh' with the role 'MAC: ASUPER'. The left sidebar contains a 'Home Page' section with links to 'Alerts...', 'Orders New', 'Animal Orders', 'Sites', and 'Change Password'. The 'Sites' link is highlighted, and a red arrow points to it with the label 'Home FACC site'. The main content area displays 'ALERTS -- NEW ANIMAL ORDERS' with a table of orders. A red arrow points to the 'Asuper, Rvh' header with the label 'Host facility ASUPER'. Another red arrow points to the 'MAC: ASUPER' header with the label 'Home FACC site: Role'. The table shows a single order with details: Source (Vendor Purchases), Vendor (Charles River Laboratories), Other Source, Order # (V007826), Order Date (01/11/2013), Requestor (Investigator2, Mac), and Protocol (2012-7273).

The example above shows that the Host facility ASUPER (*Rvh Asuper*) from the RVH changed his role to MAC:ASUPER and the order request is displayed in the ALERTS – NEW ANIMAL ORDERS

2. Follow instructions as described in [Approval of Order Request](#).
3. Indicate “TBD” in the **Room Number** Field on the **Create New Animal Order>Order Line Detail** page, then click on **Submit to Animal Buyer**

Split Rooms does not apply for Shared Housing order requests

Note

Noting “TBD” as a room number is a virtual process performed in the Home site. The information will be adjusted further on in the animal order process.

Accepting Standing Order Shipments

In order to become ACTIVE, the Order shipment or “Plan” must be accepted by the PI or Animal Buyer;

If accepted, the order moved to **Alerts –Placed Orders**

If declined or skipped, the shipment is removed from the alerts.

Order Delivery Schedule

When either the PI or the Animal Buyer accepts an incoming standing order shipment, it creates the first shipment on the plan and places it in the **Alerts – Placed Orders** section

At this point, it is treated like a regular order. The order number is the same as a regular vendor purchase number, but has a -1, -2, -3 etc. after the number, indicating the shipment number.

Once order is on the **Alerts -- Delivery Schedule**, the Animal Buyer or Animal Census Coordinator must prepare the cage cards.

Note

For the next reoccurring standing order shipment, it is indicated by an increasing number (e.g.V000652-1, V000652-2) and it will appear in the **Alerts -- Standing Orders Due**. At this point, the order is a plan and needs to be accepted before it goes to the **Alerts -- Delivery Schedule**. To see more definitions on the standing order alerts, go to [Appendix B: Standing Order Alerts](#).

Order is on Delivery Schedule for Shared Housing

To view the alerts for shared housing, the Host ASUPER must switch to the Protocol's Home FACC site from the Table of Contents (TOC) of Darwin Home Page.

As per regular animal order process, alerts will display in the Protocol Home FACC Home Page.

Note

Since the facility is NOT barcoded, the Animal Buyer can receive the animals without printing the cage cards. The printing of cage cards will be done via quick cards.

Process Received Shipment

Prior to receiving the animals in Darwin, the Animal Buyer will print the cage cards. The receiving process activates those cards so we will tear-off the activation strip and throw it away. The process for receiving standing orders shipment is the same as the regular orders.

On the delivery date, the standing orders automatically move to the **Alerts -- Animal Receipts Due** section on the ASUPER's home page.

Select an order from the **Alerts -- Animal Receipts Due** section, select the appropriate receipt option and click **Continue**.

Each option available offers different choices for receipt.

- **Received as Ordered** – With this option, you cannot change the number of animals received, but you can edit most of the other items in the Item Receipt Information section of the **Receive Shipments > Update Receipt Information** page.
- **Partial Shipment Received** – With this option, you can create an additional line item for delivering the remaining animals at a later date. If not, you may credit the protocol.
- **Additional Animals Received** – With this option, you can debit the protocol for the additional animals.
- **Shipment did not Arrive** – With this option, you can ask for a new delivery date.
- **Cancel Shipment** – With this option, you can cancel the shipment and credit the protocol.

Process Received Shipment for Shared Housing

To view the alerts for shared housing, the Host ASUPER must switch to the Protocol's Home FACC site from the Table of Contents (TOC) of Darwin Home Page.

As per regular animal order process, alerts will display in the Protocol Home FACC Home Page.

Note 

Since the facility is NOT barcoded, the Animal Facility Supervisor can receive the animals without printing the cage cards. The printing of cage cards will be done via quick cards.

Auto Receive Shipments

With the Auto-Receive Animal Shipments option, the Animal Facility Supervisor can receive multiple orders.

Auto Receive applies only to

- Shipments received as ordered. Additional, partial and late shipments must be reconciled before using the Auto Receive option.
- Shipments that have been placed with vendor and are listed in the **Alerts – Animal Receipts Due** section.

Note

This application only applies to

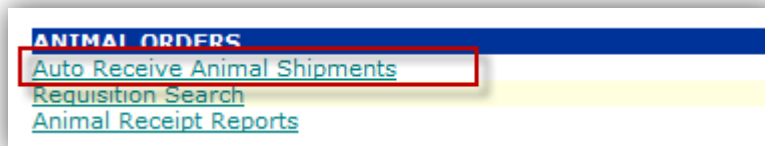
- Shipments “Received as Ordered”. Shipments with additional or fewer animals ordered must be received individually. Refer to [Process Received Shipment](#)
- Orders in the **Alerts – Animal Receipts Due** section, and neither overdue nor future deliveries. These will need to be managed individually.

Note

Cage Cards must be printed prior to receiving orders in Darwin

Auto Receive Shipments

1. Select **Auto-Receive Animal Shipments** from the **Animal Orders** section on your Darwin home page.



2. In the Auto Receive Option page, specify the filters for your search. (Fields marked with an asterisk * are required fields).
Select Vendor **Source** in the **Animal Source** field.

Auto Receive Options

The Auto Receive option will receive all shipments and activate cage cards for bar-coded facilities according to the filters you specify below. Auto receive selects shipments received with vendor.

Animal Source		*
Facility Name		
Vendor Name		
Other Source		
Expected From Date	07/05/2013	
Expected To Date	07/05/2013	

- Donated Animals
- Non-Commercial Sources
- Vendor Purchases
- Wildlife Capture

WARNING: Before continuing with auto receive, make sure you have reconciled any shipments with receiving problems such as partial and late shipments.

[Continue](#) [Clear Form](#) [Return to Home Page](#)

- The **List of Selected Shipments** page opens.

List of Selected Shipments

The following is a list of shipments selected for auto receive. To exclude shipments from being received, check the **Exclude** box next to shipment.

Exclude	Delivery Date	Vendor	Order #	Item #	Principal Investigator	Protocol	Species	Strain	Weight	Age	Sex	Qty	Cages	Facility	Room No	Barcoded?	Per Diem	Per Diem Account	Cards Status
☐	11/09/2012	Charles River Laboratories	V007798	1	Flinstone, Fred	2012-7253	Rats	Zucker			M	10	2	RVH Animal Facility-TEST		Yes	Test Rat Conventional Cage	6789	Printed
☐	11/29/2012	Charles River Laboratories	V007801	2	Flinstone, Fred	2012-7253	Rats	Zucker			F	20	4	RVH Animal Facility-TEST		Yes	Rat conventional	6789	Printed

[Finish Auto Receive](#) [Clear Form](#) [Cancel & Return to Home Page](#)

On the **List of Selected Shipments** page, the list of orders meeting your search criteria is displayed. You may choose to EXCLUDE a shipment from the auto receive process by selecting it and clicking **Finish Auto Receive**. To auto-receive ALL displayed shipments do not check 'Exclude' - just click **Finish Auto Receive**.

List of Selected Shipments

The following is a list of shipments selected for auto receive. To exclude shipments from being received, check the **Exclude** box next to shipment.

Exclude	Delivery Date	Vendor	Order #	Item #	Principal Investigator	Protocol	Species	Strain	Weight	Age	Sex	Qty	Cages	Facility	Room No	Barcoded?	Per Diem	Per Diem Account	Cards Status
☐	10/17/2012	Charles River Laboratories	V007493	1	Scott, Marilyn E	2000-4601	Mice	CD-1 (stock)		6-8 weeks	F	12	3	Mac Campus SARU Facility-TEST	MSB048	Yes	Mice Conventional Internal	223368	Printed
☐	10/24/2012	Charles River Laboratories	V007627	1	Weiler, Hope A	2012-7230	Rats	Sprague-Dawley		6 weeks	F	20	10	Mac Campus SARU Facility-TEST	MSB039	Yes	Rat Conventional Internal	218493	
☐	10/31/2012	Charles River Laboratories	V007627	2	Weiler, Hope A	2012-7230	Rats	Sprague-Dawley		6 weeks	F	20	10	Mac Campus SARU Facility-TEST	MSB039	Yes	Rat Conventional Internal	218493	
☐	11/07/2012	Charles River Laboratories	V007627	3	Weiler, Hope A	2012-7230	Rats	Sprague-Dawley		6 weeks	F	20	10	Mac Campus SARU Facility-TEST	MSB039	Yes	Rat Conventional Internal	218493	Generated
☐	11/09/2012	Charles River Laboratories	V007799	1	Dell, Farmer	2012-7257	Mice	WT CD1			B	20	4	Mac Campus SARU Facility-TEST	TEST2	Yes	Test Mouse Conventional Cage	213531	
☐	11/09/2012	Laka	V007797	1	Dell, Farmer	2012-7257	Rats	Zucker			M	10	2	Mac Campus SARU Facility-TEST	TEST2	Yes	Rat Sterile Internal	213531	Printed
☐	11/13/2012	Charles River Laboratories	V007795	1	Dell, Farmer	2012-7257	Rats	Newotherstrain	200g	8wks	M	5	1	Mac Campus SARU Facility-TEST	TEST2	Yes	Rat Sterile Internal	213531	Printed
☐	07/03/2013	Charles River Laboratories	V007917	1	Mac, Investigator	2012-7273	Rats	Newotherstrain			M	2	1	Mac Campus SARU Facility-TEST		Yes	Rat Conventional Internal	213532	Printed

Finish Auto Receive

Clear Form

Cancel & Return to Home Page

Alerts for the received shipments are removed from the home page.

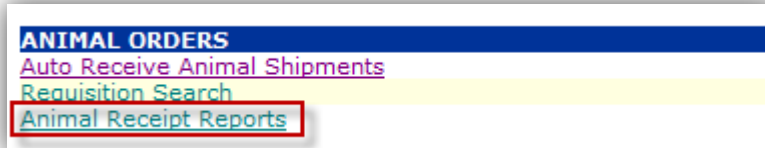
Auto Receive Shipments for Shared Housing

This option is not applicable for Shared Housing orders

Requisition Options

Animal Receipt Reports

1. From your home page, select the **Animal Receipt Reports** option from the **Animal Orders** section.



2. From the **Animal Orders Report Filters** page, select a report to view.

A screenshot of the "Animal Orders Report Filters" page. At the top, it says "To run a report, type in all desired filters, and click report option." Below this is a table with two columns: "Select" and "Report". The table lists seven report options, each with a radio button in the "Select" column.

Select	Report
☐	Animal Receipt Report
☐	Schedule of Arriving Animals
☐	Total Animals Received by Protocol and Species
☐	Total Animals Received by Protocol, Species and USDA Category
☐	Total Animals Received by Protocol, Species and Strains
☐	Total Animals Received by Vendor, Species and Strains
☐	Total Animals Received by Species and Per Diem

3. Apply filters to narrow your search, if needed. (See [Appendix C: Search Filters](#) for the definitions.)

A screenshot of the "Animal Orders Report Filters" page. It shows a series of filter rows, each with a dropdown menu for the filter type and a text input field for the value. The filters are: Order Number, Vendor, Protocol, Species, Strain, Account, Order Status, and Delivery Date Range. Each filter has a dropdown menu set to "Equals" and a text input field. To the right of the filters, there are two more dropdown menus labeled "OR: From" and "To". At the bottom of the page, there are two buttons: "Run Selected Report" and "Clear Filters".

Filter	Filter Type	Value
Order Number	Equals	
And Vendor	Equals	All
And Protocol	Equals	
And Species	Equals	All
And Strain	Equals	All
And Account	Equals	
And Order Status	Equals	All
And Delivery Date Range	Equals	

OR: From To

Run Selected Report Clear Filters

4. Click the **Run Selected Report** button.

In the example given, the animal receipts report is shown.



eSirius: Animal Requisitions

Animal Receipts Report

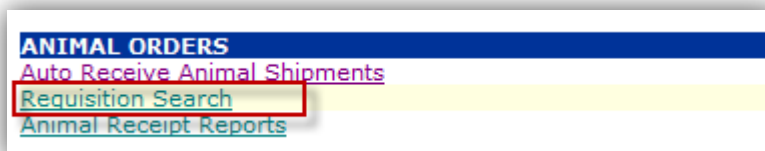
Order #	Item #	Order Date	Protocol	Requestor	Vendor	Species	Date Received	Qty Ordered	Qty Received	Cages Received	Location
N007803	1	12/10/2012	2012-7256	Morocutti, Bruna		Mice	12/10/2012	2	2	1	RVH Animal Facility-TEST
V007815	1	12/12/2012	2012-7256	Morocutti, Bruna	Charles River Laboratories	Mice	12/12/2012	10	10	2	RVH Animal Facility-TEST
V007817	1	12/20/2012	2012-7256	Presley, Elvis	Jackson Laboratories	Rats	12/20/2012	10	10	2	RVH Animal Facility-TEST
V007820	1	01/04/2013	2012-7267	Morocutti, Bruna	Charles River Laboratories	Rats	01/04/2013	5	5	5	RVH Animal Facility-TEST
V007471	1	10/04/2012	2001-3520	Ochietti, Benoit	Charles River Laboratories	Mice	01/07/2013	9	9	3	RVH Animal Facility-TEST

INTERNAL USE ONLY

Requisition Search

With the **Requisition Search** option, you can search for all your orders.

1. On your home page, select the **Requisition Search** option from the **Animal Orders** section.



2. The **Requisition Search Filters** page opens. Enter all the necessary filters. If needed, you can narrow your search by Vendor/ Source section. (See [Appendix C: Search Filters](#) for the definitions.)

Requisition Search Filters

PI

	First Name	Equals	
And	Middle Initial	Equals	
And	Last Name	Equals	

Vendor/Source

	Source Type	Equals	All
And	Vendor Location	Equals	
And	Vendor Name	Equals	All

Order

	Order Number	Equals	
And	Order Line Item Number	Equals	0
And	Receipt date	Equals	
And	Protocol Number	Equals	
And	Account No	Equals	All
And	Order Status	Equals	All
And	Facility Name	Equals	All
And	Facility Room Number	Equals	
And	Line Item Closed	Equals	☐
And	Purchase Order Number	Equals	
And	Expected Delivery Date	Equals	
And	Purchase Account	Equals	

Species

	Species Name	Equals	All
And	Strain	Equals	All
And	Per Diem Description	Equals	All

Sponsor Filters

	Sponsor First Name	Equals	
And	Sponsor Last Name	Equals	

Search Clear Filters Return to Home Page

- Once you have applied all the necessary filters, click **Search**.
- The **Requisition Search Results** page opens. Enter all the necessary filters. If needed, you can narrow your search by Vendor/ Source section. (See [Appendix C: Search Filters](#) for the definitions.)

In the example, the search results were obtained by the Animal Buyer. With the **View Requisition** and **Edit Requisition** buttons, the Animal Buyer can view and edit orders that have not been received.

The PI or PI staff does not have the select radio button and cannot edit orders.

Requisition Search Results

List of Requisition Search

Select	Order No	Item No	Protocol No	Source	Order Date	PO #	Status	Placed On	Other Source	Date Expected	Requestor	USDA Category	Strain	Weight	Age	Sex	Account No	Per Diem Desc	Vendor	Species Group	Species	Facility Name	PI Full Name	Sponsor
☐	V007820	1	2012-7267	Vendor Purchases	01/04/2013		Placed	01/04/2013		01/08/2013	Morocutti, Bruna	C	Zucker			M	9993	Rat conventional	Charles River Laboratories	Rodents	Rats	RVH Animal Facility-TEST	Investigator1, Rvh	
☐	V007821-1	1	2012-7267	Vendor Purchases	01/07/2013		Placed	01/07/2013		01/10/2013	Investigator1, Rvh	C	wild-type	10-15g	10 weeks	M	1114	Test Mouse Conventional Cage	Charles River Laboratories	Rodents	Mice	RVH Animal Facility-TEST	Investigator1, Rvh	
☐	V007822-1	1	2013-7276	Vendor Purchases	01/07/2013		Placed	01/07/2013		01/14/2013	Abuyer, Rvh	A	Zucker	200g		M	1114	Test Rat Conventional Cage	Charles River Laboratories	Rodents	Rats	RVH Animal Facility-TEST	Investigator1, Rvh	
☐	V007823	1	2012-7267	Vendor Purchases	01/07/2013		Cancelled	01/07/2013		01/09/2013	Investigator1, Rvh	C	wild-type		6 weeks	M	1114	Test Mouse Conventional Cage	Harlan	Rodents	Mice	RVH Animal Facility-TEST	Investigator1, Rvh	
☐	V007824	1	2013-7276	Vendor Purchases	01/07/2013		Placed	01/07/2013		01/10/2013	Investigator1, Rvh	D	wild-type	10-15g		M	1114	Test Mouse Conventional Cage	Charles River Laboratories	Rodents	Mice	RVH Animal Facility-TEST	Investigator1, Rvh	
☐	V007825	1	2013-7276	Vendor Purchases	01/07/2013		Cancelled	//		01/15/2013	Investigator1, Rvh	D	Zucker	250-300g		M	1114		Harlan	Rodents	Rats	RVH Animal Facility-TEST	Investigator1, Rvh	

[View Requisition](#)

[Edit Requisition](#)

[Return to Requisition Search Filters](#)

Animal Husbandry (Census)

The Animal Husbandry section, the ASUPER can;

- Activate / deactivate cage cards
- Generate cage and Room reports
- Run searches for cage by location, PI, per diems, and various other filters.

This section does not apply to Shared Housing. Cage cards are created and managed only in the animal housing site.

Activate cards for Weaned Animals

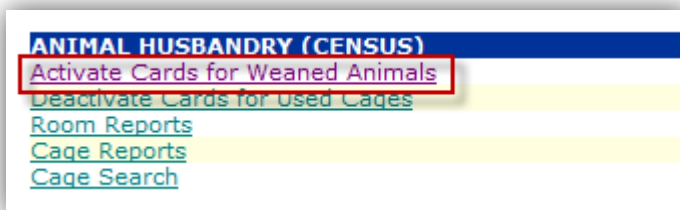
You can activate cards for weaned animals by:

- A. Card number (Typing or scanning);
- B. Breeding requisition number.

Note

Ensure that your scanner is configured to use the automatic carriage return option by scanning the ACTIVATE CAGE CARDS programming bar code on the scanner programming sheet refer to [Appendix D1 : Wireless Scanner Bar Code Programming](#)

1. From your home page, select the **Activate Cards for Weaned Animals** option from the **Animal Husbandry (Census)** section.



The **Activate Cards for Weaned Animal** page opens.

2. Select the activation date in the **Effective date** field
3. Select the option in which you wish to deactivate the cards (typing/scanning or breeding request)
4. OPTIONAL: You may wish to enter a default number of animals for each cage in the **Default Animal Count Per Cage** field. Each card will be automatically set for the number entered.

Activate Cards for Weaned Animals

Activate Weaned Cages > Effective Date

Specify the effective date of the card activation

Effective Date 07/10/2013 *

Activate Weaned Cages > Choose Activation Option

Choose one of the following options:

☒ Activate by Typing or Scanning Cards *
☐ Activate cages for selected breeding request
 Breeding Request # Item # 0 Page # 1
 Default Animal Count Per Cage 2 *Optional*

A. Activate cards for Weaned Animals by Typing or Scanning Cards:

1. Select the radio button for **Activate by Typing or Scanning Cards** and click **Continue**.

Activate Cards for Weaned Animals

Activate Weaned Cages > Effective Date

Specify the effective date of the card activation

Effective Date 07/12/2013 *

Activate Weaned Cages > Choose Activation Option

Choose one of the following options:

☒ Activate by Typing or Scanning Cards *
☐ Activate cages for selected breeding request
 Breeding Request # Item # 0 Page # 1
 Default Animal Count Per Cage 0

2. The **Scan Cards to Activate** page opens where you can scan or type cage card numbers of cages to activate in the **Card ID** column.

Note

When typing cage card numbers manually, you do not need to add the preceding zeros of the card ID.

Scan Cards to Activate

Activate Weaned Cages > Scan or Type Cards to Activate

Use your bar-code scanner to scan all cage cards that you wish to activate. You may also type the card identifier manually. In this case, you don't need to type the leading zeroes (i.e. type 1234 for card id 0000001234). For each cage, enter all relevant information.

Card ID	# of Animals	Activate On	Debit Protocol
	3	07/10/2013	☒
	3	07/10/2013	☒
	3	07/10/2013	☒
	3	07/10/2013	☒
	3	07/10/2013	☒
	3	07/10/2013	☒
	3	07/10/2013	☒
	3	07/10/2013	☒
	3	07/10/2013	☒
	3	07/10/2013	☒
	3	07/10/2013	☒
	3	07/10/2013	☒

3. Unselect the checkbox in the **Debit Protocol** column for the appropriate cards if animal numbers should not be debited from the protocol.
4. Adjust animal numbers if required
5. After entering all cards to activate, click **Continue**.
4. The **Activate Selected Cards** page opens with the list of matching cards for activation.

Activate Selected Cards

Matching cards that will be activated

The following is a list of cards that will be activated.

Select	Card ID	PI	Activate On	Protocol #	Facility	Room	Species	Per Diem	USDA Category	Account	Debit Protocol	# Animals	Order #	Item #	Vendor
☒	0000152652	Rvh, Investigator	07/10/2013	2012-7267	RVH Animal Facility-TEST	TestB	Mice	Mouse conventional	C	1114	Yes	3	B007928	1	
☒	0000152655	Rvh, Investigator	07/10/2013	2012-7267	RVH Animal Facility-TEST	TestB	Mice	Mouse conventional	C	1114	Yes	3	B007928	1	
☒	0000152658	Rvh, Investigator	07/10/2013	2012-7267	RVH Animal Facility-TEST	TestB	Mice	Mouse conventional	C	1114	Yes	3	B007928	1	

Activate Selected Cards

Select All Cards

Un-select All Cards

5. On this page, you can confirm the cards to be activated. All cards are selected for activation by default.

To remove an individual card for activation, unselect it by clicking on the corresponding checkbox in the **Select** column. You also have the option to Select All or Unselect ALL by clicking the corresponding buttons at the bottom of the dialog.

6. To activate cards, click **Activate Selected Cards**. You will be directed back to the **Activate Cards for Weaned Animals** page. To return to the home page, click on **Return to Home Page** button.

B. Activate Cards For Weaned Animals By Breeding Requisition Number:

1. Select the radio button for **Activate Cages for selected breeding request** and click **Continue**.

Activate Cards for Weaned Animals

Activate Weaned Cages > Effective Date

Specify the effective date of the card activation

Effective Date 07/12/2013

Activate Weaned Cages > Choose Activation Option

Choose one of the following options:

☐ Activate by Typing or Scanning Cards *

☒ Activate cages for selected breeding request

☐ Default Animal Count Per Cage 0

Breeding Request #	Item #	Page #
B007929	1	1

The **Scan Cards to Activate** page appears where you can see all the cards on the breeding requisition that have not yet been activated.

2. You can edit the cards by changing the number of animals, change the date, and decide whether or not to debit the protocol.

Scan Cards to Activate

[Activate Weaned Cages > Breeding Request Info](#)

Breeding Request #	B007928
Item #	1
Principal Investigator	Rvh, Investigator
Protocol #	2012-7267
Account Number	1114
Per Diem Description	Mouse conventional
Facility Name	RVH Animal Facility-TEST
Room Number	TestB

[Activate Weaned Cages > Scan or Type Cards to Activate](#)

Use your bar-code scanner to scan all cage cards that you wish to activate. You may also type the card identifier manually. In this case, you don't need to type the leading zeroes (i.e. type 1234 for card id 0000001234). For each cage, enter all relevant information.

Select	Card ID	# of Animals	Activate On	Debit Protocol
☒	0000152653	2	07/10/2013	☒
☐	0000152654	2	07/10/2013	☒
☐	0000152656	2	07/10/2013	☒
☒	0000152657	<i>adjusted # of animals</i> 4	07/10/2013	<i>protocol register is not debited</i> ☐
☒	0000152659	2	07/10/2013	☒
☐	0000152660	2	07/10/2013	☒
☒	0000152661	2	07/10/2013	☒

- Select cards to activate and click **Continue** to proceed to the **Activate Selected Cards** confirmation page.
- On the **Active Selected Cards** page, you can confirm the cards to be activated. By default, all cards are selected.

To remove an individual card for activation, unselect it by clicking on the corresponding checkbox in the **Select** column. You also have the option to Select All or Unselect ALL by clicking the corresponding buttons at the bottom of the page.

To activate cards, click **Activate Cards**. You will be directed back to the **Activate Cards for Weaned Animals** page. To return to the home page, click on **Return to Home Page** button.

Deactivate Cards for Used cages

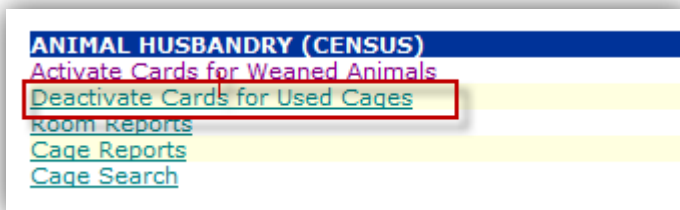
You can deactivate cards for used animals by:

- A. Cage cards
- B. Order Number
- C. Protocol
- D. Room
- E. Based on Query (feature is not available)

Note

Ensure that your scanner is configured to use the automatic tab option by scanning the **DEACTIVATE CAGE CARDS** programming bar code on the scanner programming sheet. Refer to [Appendix D1 : Wireless Scanner Bar Code Programming](#)

1. From your home page, select the **Deactivate Cards for Used Cages** option from the **Animal Husbandry (Census)** section.



The **Deactivate Cards for Used Cages** page opens.

Deactivate Cards for Used Cages

Effective Date

Specify the effective date of the card activation

Effective Date: 07/12/2013

Deactivate Cage Cards > Choose Deactivation Option

Choose one of the following options:

Deactivate by Typing or Scanning Cards	☒		
Deactivate cages for selected order number	☐	Order #	Item # 0
Deactivate cages for selected protocol	☐	Protocol #	
Deactivate cages for selected room	☐	Facility	Room
Deactivate cages based on query	☐		

2. Select the deactivation date in the **Effective Date** field.
3. Select any of an option in the **Deactivate Cage Cards>Choose Deactivation Option** section.

A. Deactivate Cages by Typing or Scanning Cards

1. Select the **Deactivate by Typing or Scanning Cages** option and click **Continue**

Deactivate Cards for Used Cages

Effective Date

Specify the effective date of the card activation

Effective Date
07/12/2013

Deactivate Cage Cards > Choose Deactivation Option

Choose one of the following options:

Deactivate by Typing or Scanning Cards
☒

Deactivate cages for selected order number
☐

Deactivate cages for selected protocol
☐

Deactivate cages for selected room
☐

Deactivate cages based on query
☐

Order #

Item # 0

Protocol #

Facility

Room

2. The **Scan Cards to Deactivate** page opens where you can scan or type cage card numbers to deactivate in the **Card ID** column.

Note

When typing cage card numbers manually, you do not need to add the preceding zeros of the card ID.

Scan Cards to Deactivate

Effective Date

Specify the effective date of the card activation

Effective Date	07/12/2013	
----------------	------------	---

[Deactivate Cage Cards > Scan or Type Cards to Deactivate](#)

Using your bar-code scanner, scan all cage cards that you wish to deactivate. You may also type the card identifier manually. In this case, you don't need to type the leading zeroes (i.e. type 1234 for card id 0000001234)

Card ID	Card Id	Card ID	Card ID	Card ID
152662	152665	152652	152653	

Continue	Clear Form	Return to Deactivate Cards Filters	Return to Home Page
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3. Click **Continue**.
4. The **Deactivate Selected Cards** page opens with the list of matching cards for deactivation. Any discrepancies, such as Cards Never Activated or Cards Already Deactivated will appear in the corresponding sections on this page.

In the example given, card ID # 152653 for Order # B007928 has never been activated.

Deactivate Selected Cards

Effective Date

Specify the effective date of the card activation

Effective Date	07/12/2013	
----------------	------------	---

Matching cards that will be deactivated

The following is a list of cards that will be deactivated on the effective date you specified.

Select	Card ID	Activated On	Time Activated	PI	Protocol #	Facility	Room	Species	Strain	Per Diem	Account	Order #	Item #
☒	0000152652	07/10/2013	16:03:40	Rvh, Investigator	2012-7267	RVH Animal Facility-TEST	TestB	Mice		Mouse conventional	1114	B007928	1
☒	0000152662	07/12/2013	15:26:53	Rvh, Investigator	2012-7267	RVH Animal Facility-TEST	TestB	Mice		Mouse conventional	1114	B007929	1
☒	0000152665	07/12/2013	15:26:53	Rvh, Investigator	2012-7267	RVH Animal Facility-TEST	TestB	Mice		Mouse conventional	1114	B007929	1

Deactivate Selected Cards	Select All Cards	Un-select All Cards
---------------------------	------------------	---------------------

Cards never activated

The following is a list of cards that are not active.

Card ID	Expected On	Order #	Item #	Vendor	Other Source	PI	Protocol #	Facility	Room	Species	Strain	Per Diem	Account
0000152653	07/10/2013	B007928	1			Rvh, Investigator	2012-7267	RVH Animal Facility-TEST	TestB	Mice		Mouse conventional	1114

Return to Deactivate Cards Filters

- In the **Matching cards That Will be Deactivated** section, confirm the cards to be deactivated. All cards are selected by default.
To remove an individual card, unselect it by clicking on the corresponding checkbox in the Select column. You also have the option to Select All or Unselect ALL by clicking the corresponding buttons at the bottom of the table.
- Click **Deactivate Selected Cards**. You will be directed back to the **Activate Cards for Weaned Animals** page. To return to the home page, click on **Return to Home Page** button.

B. Deactivate Cages for Selected Order

This option will deactivate ALL cards with the assigned order number

1. Select the **Deactivate cages for selected order number** option.
2. Enter the **Order Number** and the **Item Number**

Deactivate Cards for Used Cages

Effective Date

Specify the effective date of the card activation

Effective Date 07/12/2013

Deactivate Cage Cards > Choose Deactivation Option

Choose one of the following options:

☐ Deactivate by Typing or Scanning Cards *

☒ Deactivate cages for selected order number

Order # Item # 0

☐ Deactivate cages for selected protocol #

☐ Deactivate cages for selected room

Facility Room

☐ Deactivate cages based on query

3. Click **Continue**
4. On the **Deactivate Selected Cards** page, a list of the cards that will be deactivated on the effective date you specified will display. All cards are selected for deactivation by default.

To remove an individual card for activation, unselect it by clicking on the corresponding checkbox in the Select column. You also have the option to **Select All** or **Unselect ALL** by clicking the corresponding buttons at the bottom of the table.

Deactivate Selected Cards

Effective Date

Specify the effective date of the card activation

Effective Date 07/12/2013 *

Matching cards that will be deactivated

The following is a list of cards that will be deactivated on the effective date you specified.

Select	Card ID	Activated On	Time Activated	PI	Protocol #	Facility	Room	Species	Strain	Per Diem	Account	Order #	Item #
☒	0000152667	07/12/2013	15:55:57	Rvh, Investigator	2013-7276	RVH Animal Facility-TEST	TestB	Rats		Test Rat Conventional Cage	1114	V007930	1
☒	0000152668	07/12/2013	15:55:57	Rvh, Investigator	2013-7276	RVH Animal Facility-TEST	TestB	Rats		Test Rat Conventional Cage	1114	V007930	1
☒	0000152669	07/12/2013	15:55:57	Rvh, Investigator	2013-7276	RVH Animal Facility-TEST	TestB	Rats		Test Rat Conventional Cage	1114	V007930	1
☒	0000152670	07/12/2013	15:55:57	Rvh, Investigator	2013-7276	RVH Animal Facility-TEST	TestB	Rats		Test Rat Conventional Cage	1114	V007930	1
☒	0000152671	07/12/2013	15:55:57	Rvh, Investigator	2013-7276	RVH Animal Facility-TEST	TestB	Rats		Test Rat Conventional Cage	1114	V007930	1
☒	0000152672	07/12/2013	15:55:57	Rvh, Investigator	2013-7276	RVH Animal Facility-TEST	TestB	Rats		Test Rat Conventional Cage	1114	V007930	1
☒	0000152673	07/12/2013	15:55:57	Rvh, Investigator	2013-7276	RVH Animal Facility-TEST	TestB	Rats		Test Rat Conventional Cage	1114	V007930	1

Deactivate Selected Cards Select All Cards Un-select All Cards

- To deactivate selected cards, click **Deactivate Selected Cards**. You will be directed back to the **Activate Cards for Weaned Animals** page. To return to the home page, click on **Return to Home Page** button.

C. Deactivate Cages for Selected Protocol

This option will deactivate ALL cards assigned to the selected protocol

- Select the **Deactivate Cages for Selected Order Number** option on the **Deactivate Cards for Used Cages** page.
- Enter the 8-digit Protocol Number and click **Continue**.

Deactivate Cards for Used Cages

Effective Date

Specify the effective date of the card activation

Effective Date 07/12/2013

Deactivate Cage Cards > Choose Deactivation Option

Choose one of the following options:

Deactivate by typing or Scanning Cards

Deactivate cages for selected order number

Order # Item # 0

Deactivate cages for selected protocol

Protocol # 2013-7276

Deactivate cages for selected room

Facility Room

Deactivate cages based on query

- On the **Deactivate Selected Cards** page, a list of the cards that will be deactivated on the effective date you specified will display. All cards are selected for deactivation by default. To remove an individual card for activation, unselect it by clicking on the corresponding checkbox in the Select column. You also have the option to **Select All** or **Unselect ALL** by clicking the corresponding buttons at the bottom of the table.
- To deactivate selected cards, click **Deactivate Selected Cards**. You will be directed back to the **Activate Cards for Weaned Animals** page. To return to the home page, click on **Return to Home Page** button.

Deactivate Selected Cards

Effective Date

Specify the effective date of the card activation

Effective Date 07/12/2013

Matching cards that will be deactivated

The following is a list of cards that will be deactivated on the effective date you specified.

Select	Card ID	Activated On	Time Activated	PI	Protocol #	Facility	Room	Species	Strain	Per Diem	Account	Order #	Item #
☒	0000152178	01/10/2013	11:54:38	Rvh, Investigator	2013-7276	RVH Animal Facility-TEST	TestA	Mice	wild-type	Test Mouse Conventional Cage	1114	V007824	1
☒	0000152179	01/10/2013	11:54:38	Rvh, Investigator	2013-7276	RVH Animal Facility-TEST	TestA	Mice	wild-type	Test Mouse Conventional Cage	1114	V007824	1
☒	0000152180	01/10/2013	11:54:38	Rvh, Investigator	2013-7276	RVH Animal Facility-TEST	TestA	Mice	wild-type	Test Mouse Conventional Cage	1114	V007824	1
☒	0000152181	01/10/2013	11:54:38	Rvh, Investigator	2013-7276	RVH Animal Facility-TEST	TestA	Mice	wild-type	Test Mouse Conventional Cage	1114	V007824	1
☒	0000152182	01/10/2013	11:54:38	Rvh, Investigator	2013-7276	RVH Animal Facility-TEST	TestA	Mice	wild-type	Test Mouse Conventional Cage	1114	V007824	1
☒	0000152183	01/10/2013	11:54:38	Rvh, Investigator	2013-7276	RVH Animal Facility-TEST	TestA	Mice	wild-type	Test Mouse Conventional Cage	1114	V007824	1

D. Deactivate Cages for Selected Room

This option will deactivate ALL cage cards for the selected room

1. Select the **Deactivate Cages for Selected Room** option on the **Deactivate Cards for Used Cages** page.

Deactivate Cards for Used Cages

Effective Date

Specify the effective date of the card activation

Effective Date 07/12/2013

Deactivate Cage Cards > Choose Deactivation Option

Choose one of the following options:

- ☐ Deactivate by Typing or Scanning Cards *
- ☐ Deactivate cages for selected order number Order # Item # 0
- ☐ Deactivate cages for selected protocol Protocol #
- ☒ Deactivate cages for selected room Facility Room
- ☐ Deactivate cages based on query

2. Select the Animal **Facility** from the drop-down list and enter the **Room** number.

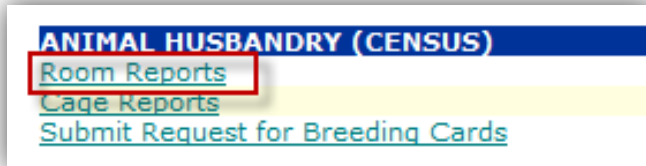
Note

Room number must exactly match the Room set up in the Master List (Facilities and room Setup). This field is Case-sensitive. Use of the alternate letter case will have implications later in the process and you will be unable to create cage cards.

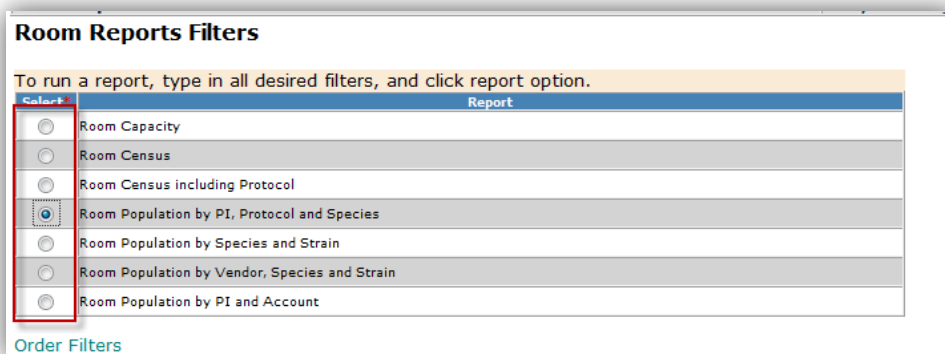
3. Click **Continue**.
4. On the **Deactivate Selected Cards** page, a list of the cards that will be deactivated on the effective date you specified will display. All cards are selected for deactivation by default. To remove an individual card for activation, unselect it by clicking on the corresponding checkbox in the Select column. You also have the option to **Select All** or **Unselect ALL** by clicking the corresponding buttons at the bottom of the table.
5. To deactivate selected cards, click **Deactivate Selected Cards**. You will be directed back to the **Activate Cards for Weaned Animals** page. To return to the home page, click on **Return to Home Page** button.

Room Reports

1. From your home page, select the **Room Reports** option from the **Animal Husbandry (Census)** section.



2. The **Room Reports Filters** page opens. Select a requisition report you need to run.



3. From the **Room Reports Filters** page, apply appropriate filters. (See [Appendix C: Search Filters](#) for the definitions.)

In the example given, a report listing the Room population, PI, Protocol and Species will be generated for the RVH Animal Facility-TEST.

Order Filters

	Order Number	Equals	
And	Item Number	Equals	0
And	Requisition Source	Equals	

Vendor Filters

	Vendor	Equals	
And	Other Source	Equals	
And	Location/ Building	Equals	
And	Species	Equals	
And	Strain	Equals	

Housing Filters

	Housing Facility	Equals	RVH Animal Facility-TEST
And	Room Number	Equals	
And	Housing Mode/Per Diem	Equals	

Financial Filters

	Purchase Account	Equals	
And	Per Diem Account	Equals	
And	Sponsored by (Last name, first name)	Equals	

Protocol Filters

	Protocol Number	Contains	
And	Protocol Year	Equals	0
And	Project Id	Equals	
And	Protocol Title	Contains	
And	Current Protocol Only?	Equals	☒

Active Filters

	Active During	Equals		OR: From		To	
--	---------------	--------	--	----------	--	----	--

- Click the **Run Selected Report** button. The appropriate report will be displayed.



eSirius: Animal Census

Room Population by PI, Protocol and Species Report

Facility	Room Number	PI	Protocol #	Species	Strain	# Active Cages
RVH Animal Facility-TEST	TestA	Rvh, Investigator	2012-7267	Mice		16
RVH Animal Facility-TEST	TestA	Rvh, Investigator	2012-7267	Mice	wild-type	3
RVH Animal Facility-TEST	TestA	Rvh, Investigator	2012-7267	Rats	Zucker	5
RVH Animal Facility-TEST	TestA	Rvh, Investigator	2013-7276	Mice	wild-type	11
RVH Animal Facility-TEST	TestB	Rvh, Investigator	2012-7267	Rats		7
RVH Animal Facility-TEST	TestB	Rvh, Investigator	2012-7267	Rats	OtherStrain	11
RVH Animal Facility-TEST	TestB	Rvh, Investigator	2013-7276	Mice		5
RVH Animal Facility-TEST	TestB	Rvh, Investigator	2013-7276	Mice	wild-type	10
RVH Animal Facility-TEST	TestB	Rvh, Investigator	2013-7276	Rats	Zucker	1
RVH Animal Facility-TEST	TestCbsl2	Rvh, Investigator	2012-7267	Mice	wild-type	4

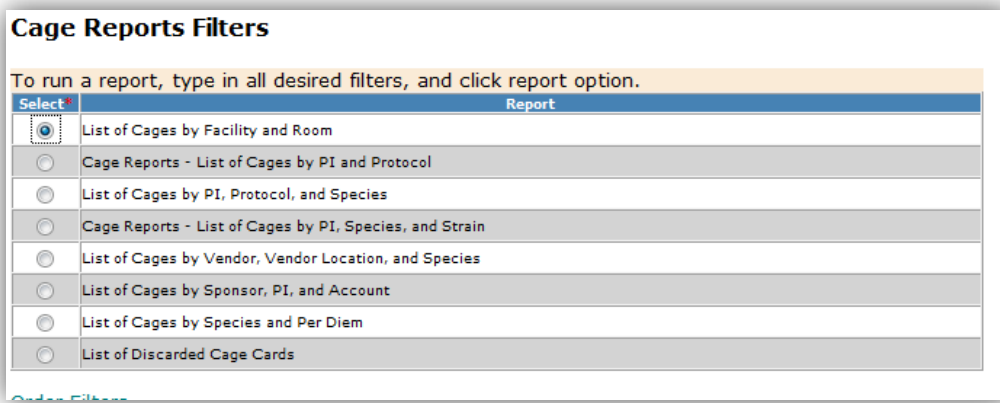
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Cage Reports

1. From your home page, select the **Cage Reports** option from the **Animal Husbandry (Census)** section.



2. The **Cage Reports Filters** page opens. Select a requisition report you need to run.

A screenshot of the "Cage Reports Filters" page. At the top, it says "To run a report, type in all desired filters, and click report option." Below this is a table with two columns: "Select" and "Report". The "Select" column contains radio buttons, and the "Report" column contains the names of the reports. The first report, "List of Cages by Facility and Room", is selected.

Select	Report
☒	List of Cages by Facility and Room
☐	Cage Reports - List of Cages by PI and Protocol
☐	List of Cages by PI, Protocol, and Species
☐	Cage Reports - List of Cages by PI, Species, and Strain
☐	List of Cages by Vendor, Vendor Location, and Species
☐	List of Cages by Sponsor, PI, and Account
☐	List of Cages by Species and Per Diem
☐	List of Discarded Cage Cards

3. From the **Requisition Reports Filters** page, apply appropriate filters. (See [Appendix C: Search Filters](#) for the definitions.)

In the example given, a report with a list of active cages within the last month will be generated for the mice housed in the RVH Animal Facility-TEST

Order Filters

Order Number Equals

And Item Number Equals 0

And Requisition Source Equals

Vendor Filters

Vendor Equals

And Other Source Equals

And Location/Building Equals

And Species Equals Mice

And Strain Equals

Housing Filters

Housing Facility Equals RVH Animal Facility-TEST

And Room Number Equals

And Housing Mode/Per Diem Equals

Financial Filters

Purchase Account Equals

And Per Diem Account Equals

And Sponsored by (Last name, first name) Equals

Protocol Filters

Protocol Number Contains

And Protocol Year Equals 0

And Project ID Equals

And Protocol Title Contains

And Current Protocol Only Equals ☒

Activation/Deactivation Filters

Activated On Equals This Month

And Deactivated On Equals

And Activated By User ID Equals

And Deactivated By User ID Equals

And Show Discarded Equals ☐

And Date Discarded Equals

And Active During Equals

Run Selected Report Clear Filters Return to Home Page

4. Click the **Run Selected Report** button. The appropriate report will be displayed.

eSirius

eSirius: Animal Census

List of Cages by Facility and Room Report

Cand ID	Requisition Source	PI	Protocol #	Expires On	Species	ISDA Level	Strain	Age	DOB	Weight	Sex	# Animals	Order #	Item #	Vendor	Other Source	Per Diem	Facility	Room	Floor	Account #	Activated On	Deactivated On	Discarded	Discarded On
0000152385	Donated Animals	Mac. Investigator 7273	2012-7273	12/01/2015	Mice	B		//		M		1	0007875	1		Mice Conventional Internal	Mac Campus SARU Facility-TEST	MSB039	MSB	213532	//	//		//	
0000152389	Donated Animals	Mac. Investigator 7273	2012-7273	12/01/2015	Mice	B		//		F		2	0007876	1		Mice Bio-Containment Level 2 External	Mac Campus SARU Facility-TEST	MSB040	MSB	213532	04/15/2013	//		//	
0000152388	Donated Animals	Mac. Investigator 7273	2012-7273	12/01/2015	Mice	B		//		F		2	0007876	1		Mice Bio-Containment Level 2 External	Mac Campus SARU Facility-TEST	MSB040	MSB	213532	04/15/2013	//		//	
0000152294	Vendor Purchases	Mac. Investigator 7273	2012-7273	12/01/2015	Rats	D		//		E		1	0007852	1	Marshall	Rat Conventional Internal	Mac Campus SARU Facility-TEST	MSB050	MSB	213532	//	//		//	
0000152295	Donated Animals	Mac. Investigator 7273	2012-7273	12/01/2015	Mice	C		//		F		9	0007851	1		Test Mouse Conventional Cage	Mac Campus SARU Facility-TEST	MSB051	MSB	213532	02/21/2013	//		//	
0000152288	Vendor Purchases	Mac. Investigator 7273	2012-7273	12/01/2015	Mice	B		//		M		11	0007849	1	LAKA	Test Mouse Conventional Cage	Mac Campus SARU Facility-TEST	MSB051	MSB	213532	02/21/2013	//		//	
0000152299	Vendor Purchases	Mac. Investigator 7273	2012-7273	12/01/2015	Mice	B		//		M		11	0007849	1	LAKA	Test Mouse Conventional Cage	Mac Campus SARU Facility-TEST	MSB051	MSB	213532	02/21/2013	//		//	
0000152291	Non-Commercial Sources	Mac. Investigator 7273	2012-7273	12/01/2015	Mice	C		//		F		9	0007850	1		Test Mouse Conventional Cage	Mac Campus SARU Facility-TEST	MSB051	MSB	213532	02/21/2013	//		//	

Protocols

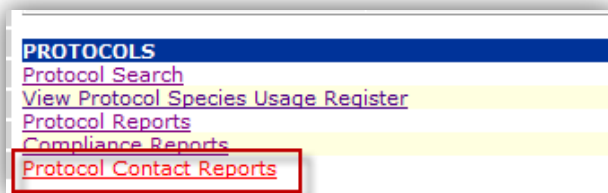


This feature is not available for Shared Housing protocols. A request to obtain Protocol information must be submitted to the protocol's Home FACC administrator.

Protocol Contact Reports

The Protocol Contact Report function generates various reports with personnel contact information.

1. Select the **Protocol Reports** option in the **Protocols** section on your Darwin home page.



The **Contact Listing Report Filters** page opens

2. Select the type of report you want to generate and select the appropriate filters for your search.
Click on the **Run Selected Report** button

Contact Listing Report Filters

Select Report

☐ Contact Listing
☐ Contact Listing by Protocol
☐ List of Protocols by Contact

Contact Filters

Contact First Name Equals
 And Contact Last Name Equals
 And Contact ID Equals
 And Contact Type Equals
 And Contact Business Role Equals

PI Filters

PI First Name Equals
 And PI Middle Initial Equals
 And PI Last Name Equals

Organization/Location Filters

Protocol Filters

Protocol Number Contains
 And Protocol Year Equals 0
 And Project ID Equals
 And Protocol Title Contains

Status Filters

Protocol Status Equals All
 And Status Date Range Equals OR: From To

Approval Filters

Approval Date Equals OR: From To
 And Protocol Expiry Date Equals OR: From To
 And 3rd Yr Full Renewal Due Date Equals OR: From To

Type of Animal Use Filters

Purpose of Animal Use Equals
 And Services-Sentinel Equals ☐
 And Services-Other Equals ☐
 And Other (specify) Equals

Run Selected Report Clear Filters Return To Homepage

The report in accordance to the search filters is displayed.

eSirius

eSirius: Protocols

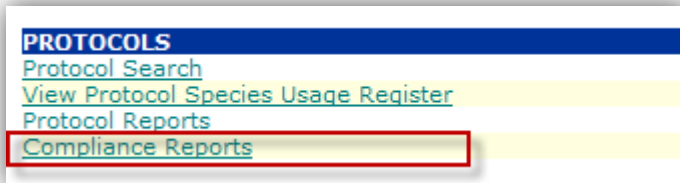
Protocol Contact Listing

Investigator Name	Protocol No	Approved	Review Date	Expiration Date	Contact	Active?
Rvh, Investigator	2013-7278	//	//	//	Co, Investigator	Yes
Flinstone, Fred	2013-7300	04/01/2012	04/01/2013	04/01/2015	Douglas, Investigator	Yes
Flinstone, Fred	2013-7300	04/01/2012	04/01/2013	04/01/2015	Mac, Investigator	Yes
Flinstone, Fred	2013-7300	04/01/2012	04/01/2014	04/01/2015	Mcgill, Investigator	Yes
Rvh, Investigator	2012-7267	12/31/2013	12/01/2013	12/01/2015	Rvh, Investigator	Yes
Rvh, Investigator	2013-7276	01/07/2013	01/07/2014	01/07/2016	Rvh, Investigator	Yes
Rvh, Investigator	2013-7277	01/07/2013	//	01/01/2014	Rvh, Investigator	Yes
Rvh, Investigator	2013-7278	//	//	//	Rvh, Investigator	Yes

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Compliance Reports

1. Select the **Protocol Reports** option in the **Protocols section** on your Darwin home page.



The **Compliance Report Filters** page opens

2. Select the report **Use Locations by Species** and select the appropriate filters for your search.
Click on the Run Selected Report button

Compliance Report Filters

To run a report, choose one report from the radio buttons and type in all desired filters, and click 'Run Selected Report'.

Note that some of the report choices below are not functional (for example "Restraint by Species")

☐ Select
 ☐ Report

☐ Use Locations by Species

PI Filters

	PI First Name	Equals	
And	PI Middle Initial	Equals	
And	PI Last Name	Equals	

Species

	Species Group Name	Equals	All
And	Species Name	Equals	All
And	Category	Equals	

Protocol Filters

	Protocol Number	Contains	
And	Protocol Year	Equals	0
And	Project Id	Equals	
And	Protocol Title	Contains	
And	Current Protocol Only	Equals	☒

Status Filters

	Protocol Status	Equals	All
And	Status Date Range	Equals	OR: From To

Approval Filters

	Approval Date	Equals		OR: From		To	
And	Protocol Expiry Date	Equals		OR: From		To	
And	3rd Yr Full Renewal Due Date	Equals		OR: From		To	
And	Active During	Equals		OR: From		To	

Funding

	Agency Funding	Equals	☐
And	Private/Commercial Funding	Equals	☐
And	Dept., start up or other Funding	Equals	☐

Type of Animal Use Filters

	Purpose of Animal Use	Equals	
And	Services-Sentinel	Equals	☐
And	Services-Other	Equals	☐
And	Other (specify)	Equals	

Report Filters

	Non-Surgical Procedures	Equals	Analgesia/sedation Anesthesia - Injection Anesthesia - Hypothermia Anesthesia - Inhalant Antibody Production - Monoclonal
And	Surgical Type	Equals	60% pancreatectomy, to remove part of the pancreas ABR Measurements Abdominal Exploration - Laparotomy Technique Abdominal Surgery Abdominal Surgery - Telemetric Probe Insertion
And	Surgery Recovery Type	Equals	
And	Drugs	Equals	Pentobarbital (18F) FDG (2R,4R)-APDC (RS)-APICA (monocrystalline iron oxide nanoparticle - MION)
And	Euthanasia Method	Equals	))) other eutha -does it show to FACC and reviewers? Abattoir Anesthetic Overdose As per the Farm's AUP #5309 Barbiturate Overdose
And	Bio-hazard Agent	Equals	1-methyl-4-phenyl 4-Hydroxytamoxif 4-Paraformaldehyd 4T1 5-fluorouracil

The report in accordance to the search filters is displayed.



eSirius: AAALAC Compliance

Use Locations by Species

Principal Investigator	Protocol No	Protocol Yr	Species	Facility Name	Room No	Type of Research
Investigator1, Rvh	2012-7267	1	Mice	RVH Animal Facility-TEST	H363Aprocedure	2 Medical relating to diseases
Investigator1, Rvh	2012-7267	1	Mice	RVH Research Lab	Freds Lab	2 Medical relating to diseases
Investigator1, Rvh	2012-7267	1	Rats	RVH Animal Facility-TEST	H363Bprocedure	2 Medical relating to diseases
Investigator1, Rvh	2012-7267	1	Rats	RVH Research Lab	otherPIlab	2 Medical relating to diseases
Investigator1, Rvh	2013-7276	1	Mice	RVH Animal Facility-TEST	H363Aprocedure	2 Medical relating to diseases
Investigator1, Rvh	2013-7276	1	Mice	RVH Research Lab	Freds Lab	2 Medical relating to diseases
Investigator1, Rvh	2013-7276	1	Rats	RVH Animal Facility-TEST	H363Bprocedure	2 Medical relating to diseases
Investigator1, Rvh	2013-7276	1	Rats	RVH Research Lab	otherPIlab	2 Medical relating to diseases
Investigator1, Rvh	2013-7277	1	Mice	RVH Animal Facility-TEST	H363Aprocedure	2 Medical relating to diseases
Investigator1, Rvh	2013-7277	1	Mice	RVH Research Lab	Freds Lab	2 Medical relating to diseases
Investigator1, Rvh	2013-7277	1	Rats	RVH Animal Facility-TEST	H363Bprocedure	2 Medical relating to diseases
Investigator1, Rvh	2013-7277	1	Rats	RVH Research Lab	otherPIlab	2 Medical relating to diseases
Investigator1, Rvh	2013-7278	1	Rabbits	MGH Large Animal Facility used by RVH	A9	3 Regulatory testing
Investigator1, Rvh	2013-7278	1	Rabbits	RVH Animal Facility-TEST	H369	3 Regulatory testing

Services

The aim of this document is to provide information on setting up the common items, request groups and service request using the Darwin web.

The Darwin Services application is a web-based application. The ASUPER uses this program to do the following:

- Service Request
- Services Search
- Service Reports

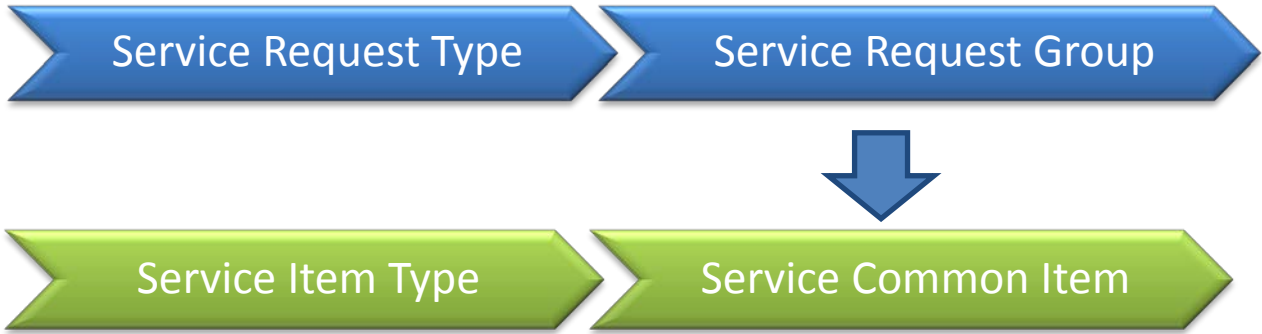
The Darwin Services application must be properly configured before starting to use the program. The set ups are managed by the Institutional Business Officer

The role of the ASUPER:

- The Animal Facility Supervisor (ASUPER) is the primary user for the Darwin Services web-based application.

There are preset **Request Types** and **Item Types** (Global settings reserved for Animal Compliance Office Only) at the top level. For example;

1. Create a **Service Request Group** attached to the appropriate **Service Request Type**
 - **Experimental:** allows you to link the service request to a specific protocol (e.g. technical procedures for a protocol)
 - **Veterinary Care:** allows you to link the Service Request for Veterinary Care related items to the PI account. (e.g. treatments/ Tech time)
 - **Husbandry:** allows you to link the Service Request for Husbandry related items to the PI account. (e.g. split cages)
 - **Administrative:** links the Service Request for business related items to the PI account. (e.g. journal corrections)
2. Create a **Service Common Item** (s) attached to the appropriate **Service Item Type**
 - **Supplies:** Common items linked to the Supplies Item Type, can be added to a service request without linking the common item to the request group.
 - **Other:** For all other Item Types. These common items must be linked to a request group during the services setup.
3. Pool the Service Common Items under the appropriate Request Group(s)



Service Request

Allows assigned office users to create and submit service requests.

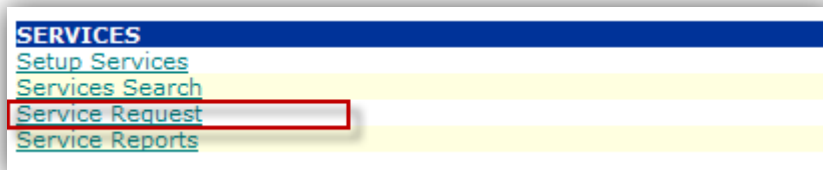
To submit service requests, you must specify the Principal Investigator and account number under which the request will be registered in the system.

The Service Request function may be used to assign Services to other Office User roles (e.g. AHEALTH for technical service) and/or to record a billable charge. The instructions described in this section will refer only to the Billing function.

The financial and the request sections of the Service Request work independently. For example, cancelling a Service Request is not sufficient to prevent billing. The **Service Request Detail** section must also be edited to cancel the billing process.

To get to Service Request:

1. Click the **Service Request** link under the **Services** section of your Darwin home page.



2. The **PI Name Search** page opens, where you should enter full or partial PI. Click **Search**.

PI Name Search

First Name	IV
Mid Initial	
Last Name	inve

Cage Info

Card ID	
---------	--

- If your search results in a selection list, select the Principal Investigator you want by clicking on the appropriate radio button on the **PI Name Search Results** and then click the **Select** button.

PI Name Search Results

Select	Full Name	Contact ID	Business Role	FACC	Email	Phone + Ext
☐	Investigator, Co		Principal Investigator	RVH-FACC	co.investigator@mcgill.ca	555.555.5555
☒	Investigator1, Rvh		Principal Investigator	RVH-FACC	rvh.investigator1@mcgill.ca	514111111x1111
☐	Investigator2, Mac		Principal Investigator	MAC-FACC	mac.investigator@mcgill.ca	514222222x2222

- The **Select Type of Service** page opens, where you should select the **Service Request Type** of your request. By default Service Request Type is initialized with the **Un-Finished** status.

Select Type of Service

Principle Investigator	Investigator1, Rvh
Service Status	Un-Finished
Service Type	Save and Continue Experimental Husbandry Veterinary Care Program Administrative Services

* Required Fields

In the example given, "Husbandry" has been selected as the Service Request Type

- Click **Save and Continue**.

Submitting a Service Request

Case Scenario: We will create a Service Request the “Cage Splits by facility Staff” service, charged to Rvh Investigator1.

1. From the **Service Type Groups** select the **Service Request Type** (Experimental, Husbandry, Veterinary care Program or Administrative Services) of your request and click **Save and Continue**.

Select Type of Service

Principle Investigator	Investigator1, Rvh
Service Status	Un-Finished
Service Type	*

Save and Continue

- Experimental
- Husbandry
- Veterinary Care Program
- Administrative Services

* Required Fields

2. Complete the required (*) and any optional information in the input fields of the **Select Service Type Groups** page. On this page, the complete the following information:
 - **Group Name:** select the appropriate Service Request Group
 - **Protocol Number:** Required only for requests under the Experimental Service Request Type
 - **Species Name:** Required only for requests under the Experimental Service Request Type
 - **Account Number:** choose one from the drop-down list
 - **Service Request Completed Date:** Can be indicated here or on the next page.

Select Service Type Groups

Service Request Header Info

Principle Investigator	Investigator1, Rvh
Service Transaction Id	H000003837
Service Status	Un-Finished

Service Information

Service Type	Husbandry
Request Date	01/24/2013
Facility Name	RVH Animal Facility-TEST
Notes	
Room Number	
Priority Description	
Group Name	Billable Husbandry Services

Protocol Information

Protocol Number	2012-7267
Species Name	Mice

Completion of the Protocol Information section is required for requests under the Experimental Service Request Type

Financial Information

Account Number	1114
Billable?	☒
Date Billed	/ /
Reference Number	
Billing Status	Open

Service Status Information

Service Request Completed Date	
Status Notes	

Save and Continue

Clear Form

In the example given, the request is for the Service Request Group "Billable Husbandry Services, charged to Rvh Investigator, account #114, for protocol #2012-7267.

Note

The sections of the **Select Service Type Groups** are also available on the **Service Request Info** page that follows. However, the mandatory fields on the **Select Type of Service** Page must be completed to continue the process.

- **Service Request Header Info:** In this section, you can see information about
 - ✓ Principal Investigator

- ✓ Status of the request (during request submission it acquires the Un-finished status by default)

- ✓ Service transaction ID that is generated automatically with the prefix that indicates the type of request by the first letter of type name.

(E.g. H000003837 indicates that this is under the "Husbandry" Service Request Type)

- **Service Information** (This section is also available on the next page)

In this section, you can see

- ✓ Information about the service request type.
- ✓ Input fields for service request date, facility name and room number, notes on the requested service, priority for the request, and Service Request Group name corresponding to the selected Service Request Type.

Note

In the Facility Name drop-down list, only the facilities assigned for the user who creates the request are available for selection

- **Protocol Information** (This section is also available on the next page): Input fields for **Protocol Number** and **Species** involved in the request. Only the species that are on a balance of the approved protocol can be selected in the request.

Note

Protocol Number and Species Name information is required for requests under the Experimental Service Request Type.

Note

Only the species that are on a balance of the approved protocol can be selected in the request.

- **Financials Information:** (This section is also available on the next page)
 - **The account number:** must be selected
 - **Billable** check box: If checked, the request will be billed.
 - **Date Billed:** is not editable at this stage
 - **Reference Number:** Optional field for reference information.
 - **Billing Status:** is not editable and it is set as “Open” at this stage.
 - **Service Status Information:** You have the option to enter the Service Request Completion Date and Status Notes. (This section is also available on the next page)
3. Click **Save and Continue**.
 4. The **Service Request Info** page appears where you can view or edit the existing information of the selected service request that were completed on the previous page.

Service Request Info

Service Request Header Info

Principle Investigator	Investigator1, Rvh
Service Transaction Id	H000003839
Service Status	Un-finished

Service Information

Service Type	Husbandry
Request Date	01/24/2013
Facility Name	RVH Animal Facility-TEST
Notes	
Room Number	
Priority Description	
Group Name	Billable Husbandry Services

Service Request Detail Information

Sub Group Description	Item Description	Quantity	Input Units	Rate	Cost	Item Service Date	Item Complete Date	Item Billable?	Invoice Description	Priority Description	Item Bill Date
	Test item 1	0.00	each	0.11	0.00	01/24/2013		☒			//
	Cage Split by Facility Staff	0.00	Cage (\$)	1.00	0.00	01/24/2013		☒			//

Calculate Cost Add Supplies

Protocol Information

Protocol Number	2012-7267
Species Name	Mice

Financial Information

Account Number	
Billable?	☒
Date Billed	//
Reference Number	
Billing Status	Open

Service Status Information

Service Request Completed Date	
Status Notes	

Submit Request Clear Form Save and Finish Later Cancel Service Request

5. Complete the **Service Request Detail Information** section;

This is the financial element independent of the service request status.

- a. Only records that are fully completed in this section will appear on invoices. The criteria for billing are the following;
- **Quantity** (if zero, item will not be billed)
 - **Rate** (if zero, item will not be billed)
 - **Item Complete Date**: No association with the Service Request Completed Date field in the Service Status Information section. The item will not be billed unless the Item Complete Date for that item is specified.
 - **Item Billable**: Must be selected in order for the item to be billed.

Sub Group Description	Item Description	Quantity	Input Units	Rate	Cost	Item Service Date	Item Complete Date	Item Billable?	Invoice Description	Priority Description	Item Bill Date
	Test item 1	5.00	each	0.11	0.00	01/24/2013	01/24/2013	☒			//
	Cage Split by Facility Staff	2.00	Cage(s)	1.00	0.00	01/24/2013	01/24/2013	☒			//

Calculate Cost Add Supplies

Note

The item will not be billed unless the 4 criteria are met for that item.

In the example given, Item "Test Item 1" will not be billed because the Quantity was left at "Zero"

Tip

Invoice Description and Priority Description are optional (If you want different text from the Item Description to show only on the invoice).

- b. **Add Supplies** button allows you to add additional supply common item(s). Darwin will search for all Service Common Items with the Service Item Type "Supply".

To add supplies;

- i. Click the **Add Supplies** field button. The Supplies Search Filter and Result page opens.
- ii. Enter the full or partial description of the supply and click **Search**.

Supplies Search Filter and Result

Supplies Search Filters

Supply: *

The **Supplies Search Result** will appear under the **Supplies Search Filters** section.

Supplies Search Filter and Result

Supplies Search Filters

Supply: *

Supplies Search Result

Select	ID	Description	Units	Rate	Rate Units
☒	10000523	Gloves latex	Pair	0.75	Pair

- iii. Select the supplies you want to add and click **Add Selected Supplies**. The page resets to include only the **Supplies Search Filters** which allows you to continue searching for additional supplies.
 - iv. Click **Done** when you finished selecting the supplies. This brings you back to the **Service Request Info** page. Complete the fields meeting the billing criteria in the **Service Request Detail Information** section for this item (Quantity, Rate, Item Complete Date, check Item Billable)
6. Click **Calculate Cost**. The Click Calculate Cost field button must be clicked to populate the cost to the invoice. The total cost will display in the Amount field of the **Financial Information** section

Financial Information

Account Number	1114
Billable?	☒
Amount	0.72
Date Billed	/ /
Reference Number	
Billing Status	Open

Note

An item will not be billed unless the 4 criteria are met for that item and the Calculate Cost button has been clicked.

7. **Protocol Information** section: If you are submitting a request under the Experimental Service Request Type, ensure the **Protocol Number** and the **Species Name** is indicated in this section.
8. **Financial Information** section: Ensure the **Account Number** is indicated and the **Billable** checkbox is selected. The **Billing Status** of the Service Request is set at “Open” by default.
9. Complete the **Service Request Completed Date** in the Service Status Information section: if you did not enter it in the previous page, you need to enter it before you click on the **Submit Request** button.
10. To complete and submit your request, click the **Submit Request** button.
 - The transactions are ready to be billed
 - The Service Status will change from “Un-finished” to “Pending”. It will remain at the pending status unless the request is later cancelled.

Service Request Header Info	
Principle Investigator	Investigator1, Rvh
Service Transaction Id	H000003839
Service Status	Pending

- The Service Request will no longer appear on the Home Page Alert.

Other actions can be taken by clicking the following buttons;

- **Clear Form** to reset the form and restart
- **Save and Finish Later.** The changes will be saved but the request will remain in the un-finished status. request is placed into the Alerts – Un-Finished Service Requests section of your home page
- **Cancel Service Request:** Will cancel ONLY the Service Request. To cancel the billing transaction, the **Service Request Detail Information** section must also be edited by unchecking the **Item Billable?** checkbox.

Note

The action buttons (**Save and Continue**, **Clear Form**, **Save and Finish Later** and **Cancel Service Request**) are associated directly to the request and do not affect the billing process. If all the criteria for billing are met in the Service Request Detail Information section, the transaction will be billed, regardless of the Service Request status.

Service Search

Allows the authorized Office Users to review and edit service requests. A service request can only be editable if the status has been set to Billed.

1. Click on **Service Search** from the Services section on the Darwin Home page.
2. The Service Request Search Filters page opens. Enter one or a combination of search filters (or no filters to see all service requests). Click **Search**

Service Request Search Filters

Search for Service Request setup in the eSirius Service application.

Service Filters

	Service Group	Equals	
And	Service Request Group	Equals	Billable Husbandry Services
And	Service Status	Equals	
And	Service Transaction ID	Equals	
And	Reference Number	Equals	
And	Service Transaction Date	Equals	OR: From To
And	Service Type	Equals	

Species

	Species Group Name	Equals	All
And	Species Name	Equals	All
And	Category	Equals	

Housing Filters

	Housing Facility	Equals	
And	Room Number	Equals	
And	Housing Mode/Per Diem	Equals	

Financial Filters

	Per Diem Account	Equals	
And	Sponsored by (Last name, first name)	Equals	

PI Filters

	PI First Name	Equals	
And	PI Middle Initial	Equals	
And	PI Last Name	Equals	

Protocol Filters

	Protocol Number	Contains	
And	Protocol Year	Equals	0
And	Project Id	Equals	
And	Protocol Title	Contains	

In the example given, the Service Request Group filter was used to search for all service requests under the Billable Husbandry Services Request Group.

3. The **Service Request Search Filters** page opens displaying the results of your search.

Service Request Search Results

Select a request to modify the request information. Click on the Request number to view the information.

Select	Service Transaction ID	Service Request Date	Account Number	Service Group	Total
☐	H000003837	01/24/2013	1114	Billable Husbandry Services	0.72
☐	H000003839	01/24/2013	1114	Billable Husbandry Services	0.75

[Edit Selected Service Request](#)

[Return to Services Search Filters](#)

View a Service Request

1. On the **Service Request Search Results** page, select the appropriate Service Request by clicking on the hyperlink of the **Service Transaction ID**.

Service Request Search Results

Select a request to modify the request information. Click on the Request number to view the information.

Select	Service Transaction ID	Service Request Date	Account Number	Service Group	Total
☐	H000003837	01/24/2013	1114	Billable Husbandry Services	0.72
☐	H000003839	01/24/2013	1114	Billable Husbandry Services	0.75

[Edit Selected Service Request](#)

[Return to Services Search Filters](#)

2. The **Service Request Info** page opens where you can view the details.
3. Although the Cancel Request button is available, the Cancel Service Request action must not be done on this page. The Edit Service Request application is used for this purpose (refer to [Cancel Service Request](#))

Note

Cancelling the Service Request will change the Service Status to “Cancelled” This action does not impact the invoicing process. If all the criteria for billing are met in the Service Request Detail Information section, the transaction will be billed, regardless of the Service Request status.

Service Request Info

Service Request Header Info

Principle Investigator	Investigator1, Rvh
Service Transaction Id	H000003837
Service Status	Cancelled

The Service Status has been changed to "Cancelled"

Service Information

Service Type	Husbandry
Request Date	01/24/2013
Facility Name	RVH Animal Facility-TEST
Notes	
Room Number	
Priority Description	
Group Name	Billable Husbandry Services

Editing a Service Request

1. From the **Service Request Search Results** page, the radio button for appropriate Service Request and click **Edit Selected Service Request**.

Service Request Search Results

Select a request to modify the request information. Click on the Request number to view the information.

Select	Service Transaction ID	Service Request Date	Account Number	Service Group	Total
☐	H000003837	01/24/2013	1114	Billable Husbandry Services	0.72
☐	H000003839	01/24/2013	1114	Billable Husbandry Services	0.75

Edit Selected Service Request

[Return to Services Search Filters](#)

2. The **Service Request Info** page opens. Make the required adjustments.
3. To complete and submit your request, click the **Submit Request** button.
 - The transactions are ready to be billed
 - The Service Status will change from "Un-finished" to "Pending". It will remain at the pending status unless the request is later cancelled.
 - The Service Request will no longer appear on the Home Page Alert.

Service Request Header Info

Principle Investigator	Investigator1, Rvh
Service Transaction Id	H000003839
Service Status	Pending

Service Information

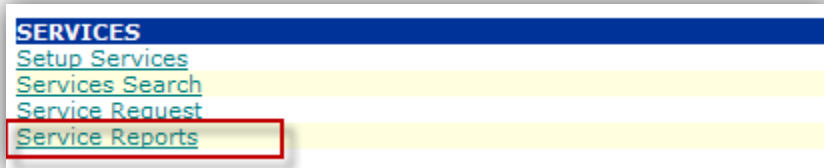
Other actions can be taken by clicking the following buttons;

- **Clear Form** to reset the form and restart
- **Save and Finish Later.** The changes will be saved but the request will remain in the un-finished status. request is placed into the Alerts – Un-Finished Service Requests section of your home page
- **Cancel Service Request:** Will cancel ONLY the Service Request. To cancel the billing transaction, the **Service Request Detail Information** section must also be edited by unchecking the **Item Billable?** checkbox.

Service Reports

The Services Reporting option provides a summary of Service Requests according to your search criteria. Reports may be run for the current billing period or for any historical period.

1. Select **Service Reports** from the **Service** section of the Darwin Home page



The **Service Reports Filters** page opens

2. Select the Report type and enter one or a combination of search filters (or no filters to see all service requests). Click **Run Selected Report**.

The Search Results display in the **Service Charges Group Summary Report**.



eSirius: Services

Service Charges Group Summary Report

Service Number	Service Date	Account	Principal Investigator	Group Description	Amount
H000003837	01/24/2013	1114	Investigator1, Rvh	Billable Husbandry Services	0.72
H000003839	01/24/2013	1114	Investigator1, Rvh	Billable Husbandry Services	0.75

INTERNAL USE ONLY

Appendix A: Animal Order Alerts

The following table defines the animal order alerts, who would see the alerts, and who can take action on the order:

Alert	Why a requisition is displayed here:	Who sees it A = 'Always' W = 'Workflow status dependent'	Workflow statuses - indicate who can open the order and take action
New Animal Orders	When the PI or staff member submits a new order to the Animal Office.	PI and PI Staff (A) Animal Facility Supervisor (W) Animal Buyer (A)	Animal Facility Supervisor Animal Buyer
Placed Orders	When the order has been confirmed by the vendor.	PI and PI Staff (A) Animal Buyer (A) Animal Facility Supervisor (A)	Animal Buyer
Wait Listed Orders	When the order has been wait-listed by the vendor.	PI and PI Staff (A) Animal Facility Supervisor (A) Animal Buyer (A)	Animal Buyer
Orders Cancelled by PI	When the PI requests cancellation of a new or placed order.	Animal Buyer (A) Animal Facility Supervisor (A)	Animal Buyer
Delivery Schedule	When the order has been placed, the order will appear in this alert 7 days before the delivery date.	Animal Buyer (A) Animal Facility Supervisor (A) Receiving Technician (A)	Animal Buyer, Animal Facility Supervisor, Receiving Technician
Animal Receipts Due	Order moves from delivery schedule to here on the scheduled delivery date. It stays here until received in the system.	Animal Buyer (A) Animal Facility Supervisor (A) Receiving technician(A)	Animal Buyer, Animal Facility Supervisor, Receiving Technician
Animal Receipt	When an order has been received in Darwin. This alert remains on the PI's home page for a predetermined # of days.	PI and PI Staff (A)	PI and PI Staff
Protocol usage	When animal usage on a protocol reaches 80% (percentage is predetermined in preferences).	PI and PI Staff (A)	PI and PI Staff

Appendix B: Standing Order Alerts

The following table defines the standing order (STO) alerts and who would see the alerts, and who can take action on the order:

Alert	Why a requisition is displayed here:	Who sees it A = 'Always' W = 'Workflow status dependent'	Workflow statuses - indicate who can open the order and take action
New Standing Orders	When a STO is created – it displays here until approved by Animal Buyer.	PI and PI Staff(A) Animal Facility Supervisor (W) Animal Buyer (A)	Animal Facility Supervisor Animal Buyer
Animal Standing Orders Due	Each upcoming shipment of a standing order appears here 7 days prior to expected delivery date. When accepted by either the PI or Animal Buyer, it moves to Alerts -- Placed Orders for PI and Alerts --Delivery Schedule for Animal Buyer. If skipped by PI or Animal Buyer, it no longer appears here (Animal Buyer gets email if PI skips).	PI and PI Staff (A) Animal Buyer (A) Animal Facility Supervisor (A)	PI and PI Staff Animal Buyer
Lapsed Standing Orders	If an upcoming shipment is neither accepted nor skipped, it moves to this alert on the expected delivery date.	PI and PI Staff (A) Animal Buyer (A) Animal Facility Supervisor (A)	Animal Buyer

Appendix C: Search Filters

Any of the following search filters/operators may be used to generate desired search results:

Equals	Search results contain all groups from the first browser window with exactly the same value of the field set on the filters page.
---------------	---

Not Equal To	Search results do not contain groups from the first browser window with exactly the same value of the field set on the filters page
---------------------	---

Like	Search results contain all groups from the first browser window, which contain value that was set on the filters page, in the field (it is part of the field value).
-------------	--

Contains	Search results contain only groups from the first browser window which contain value that was set on the filters page, in the field (it is part of the field value).
-----------------	--

Starts With	Search results contain all groups from the first browser window with field value that starts exactly with the same value that was set on the filters page.
--------------------	--

Sounds Like	Search results contain all groups from the first browser window with the value of field that is nearly to the value set on the filters page (only some symbols in the field could be mistaken).
--------------------	---

Blank	Search results contain all groups from the first browser window with empty value of set field.
--------------	--

And/Or	Enables you to refine or expand the scope of your search
---------------	--

And	Show results containing all of the chosen parameters.
------------	---

Or	Show results containing one of the chosen parameters.
-----------	---

Appendix D1: Wireless Scanner Bar Code Programming

ACTIVATE CAGE CARDS



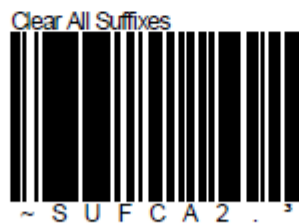
DEACTIVATE CAGE CARDS

Carriage Return Suffix

Programs the scanner to add an Enter key function after each scan.



CLEAR SCANNER



Appendix D2: Wireless Scanner Bar Code Programming



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IMAGETEAM™ 3800, 3900, 4600, 4800, 3800r, 3800i Hand Held Linear Imager USB Programming Bar codes - USB, Laptop, Suffix, Trigger Modes, Factory Default

Factory Defaults

Resets your scanner to default settings.



MANUAL TRIGGER: Need to press the trigger to read.

AUTOMATIC TRIGGER: The beam is always on

PRESENTATION MODE: The reader is activated

CARRIAGE RETURN SUFFIX: If you want a carriage return after the barcode

TAB SUFFIX: To add a tab after the barcode, scan the bar code

REMOVE SUFFIX: To remove the suffixes.

TAB Suffix

Programs the scanner to add a TAB key function after each scan.



Carriage Return Suffix

Programs the scanner to add an Enter key function after each scan.



Clear all Suffixes

Removes all suffixes



Auto Trigger

Hands free, Scans continuously at full power.

Note: NOT available in 4600 or 4800



Presentation Mode

Hands free, LED's are off until a bar code is presented.



Reread Delay = Medium

Sets a delay before the scanner can read the same barcode again.

Note: for the 3800 and 3900 Only



Note: For 4600g, 4800i, 3800r, 3800i Only



Manual Trigger

Must press the trigger to activate the scanner

