VERSION 7
October 2007

GENERAL OVERVIEW

This program is used in animal facilities at both the NCI-Frederick and NCI-Bethesda [LASP] campuses to manage animal inventories, individual animal and experimental records, animal study proposals and other ACUC records, individual training records, billing/technical charges, and investigator allocations.

All LASP staff members utilizing the FACILITY application are **required** to ensure that current and accurate information is maintained for its customers. Facility managers must ensure that current versions of the FACILITY manual are maintained in central locations [both inside the facility and in the administrative areas] for easy access. All new users to the FACILITY system must undergo mandatory training before access will be granted.

CONTENT OVERVIEW

GENERAL RESOURCE LINKS

Infologix [Carts]	http://www.infologixsys.com/
FACILITY Web Page	http://web.ncifcrf.gov/rtp/lasp/fac/
LASP Standard Operating Procedures	http://web.ncifcrf.gov/rtp/lasp/fac/
LASP Web Page	http://web.ncifcrf.gov/rtp/lasp/intra/
Locus Online Facility User Manual	http://web.ncifcrf.gov/rtp/lasp/fac/
Locus Technology, Inc.	http://www.locustechnology.com/
Online LASP Access Site	http://www.ncifcrf.gov/rtp/lasp/intra/facilityreports/login.asp
Strain Code Requests	http://web.ncifcrf.gov/rtp/lasp/intra/forms/strain_code/
Trovan [Microchips]	http://www.trovan.com/

CONTACT INFORMATION

General Troubleshooting	Jaime Greear Michelle Gottholm Ahalt Tina Sadr [Bethesda]
ACUC – Frederick	Michelle Gottholm Ahalt
ACUC – Bethesda	Tina Sadr
Account Set-Up/Securities	Jaime Greear
Allocations	Mary Custer Mark Shrader
Billing/Technical Charges	Sherry Stockman Crummitt
DMS	Jon Oyhus Carol Crum Devilbiss Donna McDonald

Investigator/LASP Staff Records	Sherry Stockman Crummitt
LASP Online Access System	Jaime Greear
Online Training Database Printers [Zerbra]	Jaime Greear Jaime Greear
Cage Cards	Jane Miller
Reports	Jaime Greear
Software Installation [FACILITY]	Jaime Greear
Software Installation [General Programs]	Computer Help Desk [Frederick] CIT [Bethesda]
Strain Code Requests	Jaime Greear
Training [Qualifications]	Pam Dellen
Training [Staff Records] - Frederick	Pam Dellen
Training [Staff Records] - Bethesda	Tina Sadr
Wireless Installation/Troubleshooting	Jaime Greear

Requesting TRAINING and ACCESS to the FACILITY Program

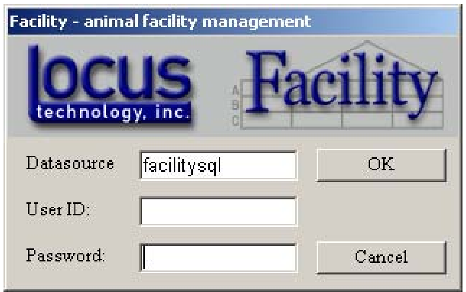
To obtain access to the FACILITY database, you will be required to receive training by a designated staff member. After you have completed the training and proficiency demonstrated, you will be granted access to the FACILITY database. The following forms are available on the FACIILTY web page and must be completed to initiate the request process:

1. **FACILITY Database – PI Data Entry Requirements**: Any investigators interested in having data maintained in the FACILITY database, must complete this form to outline the level of data and specific fields he/she would like to have maintained in the database. Upon completion this form must be emailed to Jaime Greear [greearj@mail.nih.gov] for processing. http://web.ncifcrf.gov/rtp/lasp/fac/

2. **FACILITY Database – Staff Training Documentation**: Training is mandatory for all users of the FACILITY database to ensure the integrity and accuracy of the data maintained in the system. This form is used to document training for those individuals that will be entering data into the FACILITY database. All users of the FACILITY database are required to adhere to the established SOP governing the data entry requirements. After completing Part A, please return this form to Jaime Greear [greearj@mail.nih.gov] for processing. http://web.ncifcrf.gov/rtp/lasp/fac/

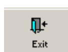
3. **FACILITY Database - Account Request Form**: After completion of your FACILITY training session[s], you are authorized to request access to the FACILITY database and will be instructed by the designated trainer to complete this account request form. After completion of Part A, please send this form to Jaime Greear [greearj@mail.nih.gov] for processing. http://web.ncifcrf.gov/rtp/lasp/fac/

ENTERING THE FACILITY PROGRAM



1. Click on the **FACILITY** icon  Facility.lnk that has been loaded onto your desktop
2. Enter assigned **ID** and **Password**
3. Click **OK**
4. **FACILITY** will open to a default Group Manager screen
5. Click the Select Facility Button
6. Highlight your facility *[NOTE: facility access is limited, so you may only have access to one facility]*
7. Click **OK**
8. You are now within your own Group Manager to start building your facilities and accessing your animal inventories

EXITING THE FACILITY PROGRAM

Click on the exit doorway  on the menu bar. You will be prompted to save any unfinished screens. If you do not have any unfinished screens, you will be exited without prompt from the program.

INVENTORY AND BILLING PROCEDURES

Adding Animals to the Inventory

1. Collect wean sheets, transfer sheets, animals received from APA or R&Q for the week.
2. Add applicable animals/cages based on the sheets collected. Follow the procedures ***To Add Animals to a Group*** [add animals are for weaned animals or animals that come from another source] or ***To Transfer Animals to a Group*** [transfers are for when you have animals under the same group, but in different rooms, and you want to move animals to another room or if one investigator is giving animals to another] found in this SOP.

Deleting Animals from the Inventory

1. Collect Death Logs for the week. ***NOTE****: Some facilities these are collected daily and some are done weekly [please check with the facility secretary for instructions]. In some instances the technicians are deleting animals/cages while working in the rooms and therefore death logs are not generated.*

2. Make changes to animals and cages in groups based on the provided death logs. Follow the procedures for ***To Delete Animals from a Group*** or ***To Delete Cages from a Group*** found in this SOP.
3. Supplemental Report 006 [Uplist] can be used as an inventory tool. Follow the instructions below for printing reports to select and print this report. The default output is all rooms in the Facility. To print a single room report:

   a. Select the Rpt006 - Current Cage Inventory [Uplist]
   b. When it has loaded onto the screen click Rows at the top of the window
   c. Click Filter.. a new window will pop up
   d. In the Columns window click room_number. It will show in the uppermost window
   e. Type an equal sign (=), then a space
   f. Type a single quote (‘), then the room number you wish to print, then another single quote (‘). It should appear as: room_number = ‘101’
   g. Click **OK**. The report will refresh with only the selected room number, which can then be printed.

NOTE: The uplist report is a good resource to keep in the office and to update regularly.

Running FACILITY Edit Reports

Before running weekly reports to submit for billing, four edit reports must be run, and any problems fixed. These reports are found in the Supplemental program:

1. Click the “Edit” button on the main menu
2. Scroll down to “Facility Edit” and a sub-menu will appear
3. Click on each item in turn to initiate the edit reports

   - *Group Edit*
   - *Cage Edit*
   - *Cage/Room Edit*
   - *Animal Edit*

4. For each edit report, a new window will appear. If there are no issues, a “No Errors” box will appear. If there are errors, they will be listed in the window. Identify the error, correct the error, and then re-run the report to make sure it has been properly corrected.
5. Upon completion, close the “no errors” box and click on the next edit item
6. When all four of the edit programs run with no errors, inventory reports may be printed and submitted

If you have any questions about how to correct an error, contact the main data entry person for your facility or Jaime Greear [greearj@mail.nih.gov]

Running Inventory Reports

1. When all changes are completed for the week, go to Facility Supplemental System
2. Select **Reports** then select **Facility Reports**
3. Choose Rpt 007, when report pops up, go to **File** and **Print**
4. Go back to **Reports**
5. Choose Rpt 008, when report pops up, go to **File** and **Print**
6. Go back to **Reports**
7. Choose Rpt 081, when report pops up, go to **File** and **Print**
8. Each week, fax reports to the LAM Secretary [301-846-6590] by close of business on Thursday

NOTE: To close reports either go to file and close or click on the "X" button in the upper right corner.

Monthly Cage/Head Count

NOTE: *When the monthly cage/head count is performed, the data that the technicians manage directly in the FACILITY database should not be changed under any circumstance. The data entered by the technicians serves as a real-time census and a cage/head count is not required for those cages. If there are any questions regarding the data managed, please discuss directly with the responsible technician.*

NOTE: *A monthly Q&A should be done to count the number of cages in a room, to ensure the billing/inventory is accurate for the data being track in "real time."*

1. Go to the Facility Supplemental System
2. Select **Reports** then select **Facility Reports**
3. Choose Rpt 006 (Current Cage Inventory [Uplist]), when report pops up, go to **File** and **Print**. ***NOTE****: this is used once a month to do an actual cage and head count. The rest of the time the death logs, wean sheets, and transfer sheets are used for inventory.*
4. Provide the report to the Animal Care Supervisors and they are given to the appropriate personnel to do the actual verification of the numbers of animals and cages.
5. Upon verification, the report should be sent to the facility secretary for correction. ***NOTE****: This is done for an internal quality assurance check to verify animals and cages.*
6. The facility secretary will add and delete animals as necessary according to the SOP.

Tracking Animal Usage in FACILITY for ASP Documentation Requirements

These instructions are only for tracking animal usage pertaining to incoming and outgoing animals housed for ASP Animal Use documentation only [i.e., R&Q, DVR]. This will be used for those situations where cage usage is not required to be tracked or animals do not have to be put into cages. You must be granted permission by LASP in advance to track animals in this manner.

1. Create a Group for the animals using the approved ASP [see To ADD a Group].
2. Entry of animals into the Group:

   a. Reference the animal receipt documentation [APA or Outside Source] for the animal information
   b. From the Group Manager, select the Group
   c. Click the Animals in Group Tab
   d. Click the Add Animals Button
   e. Enter the total number of animals to be entered [total males and females]
   f. Select the Strain from the drop-down list or enter 01PEN for pending names [NOTE: This strain should be requested using the online strain code request system if it is not already available for selection]
   g. Enter the sex

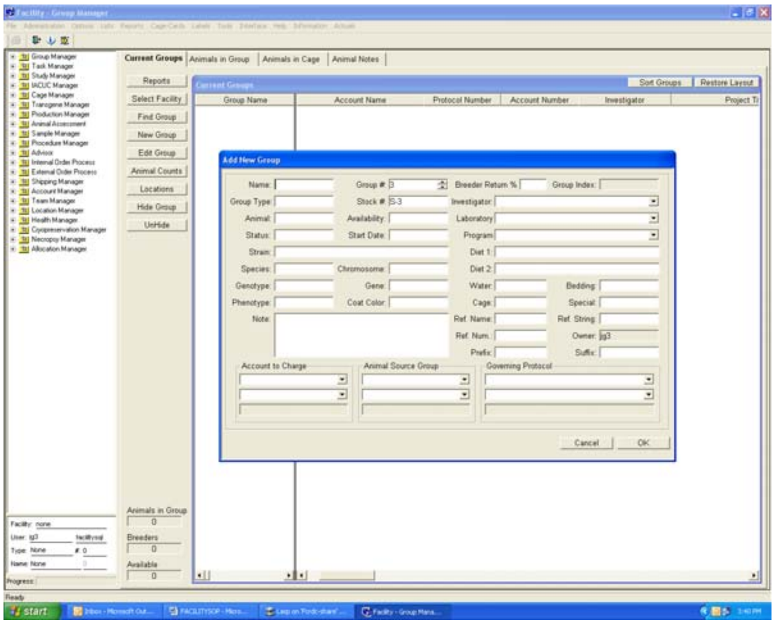
      - If only one sex, select it from the dropdown
      - If have both sexes, add up the # of one sex and enter it in the form: 4f or 6m. The program will automatically add that # of one sex and the balance will be the other sex.

   h. Enter the Birth Date
   i. Select the Investigator from the dropdown list [do not type this information into the box manually]
   j. Click **OK**. Confirm in the next box.

3. When the mice leave or are euthanized, they can be removed from the inventory by Sacrificing and then hiding them as is currently being done. [see To DELETE Animals from a Group]
4. If desired, Cage usage can also be tracked by adding Cages in the Cage Manager. [see To ADD Cages to a Group]

GROUP MANAGER MODULE

This is where facility staff will create groups of animals for each animal study proposal



To ADD a Group

1. Select the Group Manager from the listing on the left
2. Select the Current Groups Tab
3. Click New Group Button
4. Insert the Name - **Default format is ASP, room #** [i.e. 06-001,107] **NOTE:** *The Group name can be customized to fit the PI's experiments, by adding strain name, project names or ID's.*
5. Select the applicable Group Type from the drop-down list **[this is a required field]**
6. Select Strain. You can use 01 Mice if more than one strain is in the group. Otherwise, select the correct strain name. Correct strain names are a LASP requirement on individual animals. If a strain code request is pending, you can select the "pending strain description code" [01PEN, 02PEN, etc.] until the new code is received.
7. Select Species from the dropdown list
8. Select Investigator from the dropdown list. **DO NOT** manually type in the investigator's name. The investigator selected in this box **MUST** match the PI on the approved ASP. The account and the investigator are not required to match.
9. Enter the Location in the box named Laboratory. This is the room to which the Group will be assigned. A group can only be assigned to a single room.
10. Select the Account to Charge from the drop-down list
11. Select the Governing Protocol from the drop-down list. **DO NOT select a Modification as the Governing Protocol** [i.e., do not select 07-0001-M1 … only 07-0001 designations should be selected]
12. If this is a protocol renewal or a transfer of animals … select the Animal Source Group from the drop-down list

13. Click **OK**
14. Click **YES** to add this group

<u>To EDIT a Group</u>

1. Select the Group Manager from the listing on the left
2. Select the Current Groups Tab
3. Highlight the group
4. Click the Edit Group Button
5. Make applicable changes
6. Click **OK**
7. Click **YES** to make the changes

<u>To Renew an ASP for a Group</u>

This is the procedure to follow when a new Animal Study Protocol is approved, and animals are to be transferred from an old ASP to the new ASP.

<u>NOTE</u>: DO NOT simply open the old group and change the Governing Protocol from the original to the new ASP. This will result in inaccurate records.

1. In Group Manager, Current Groups, make a new Group following the instructions above. You can duplicate the information from the old Group. Make a note of the new Group #'s to tell the old from the new.
2. Designate the new ASP as the Governing Protocol.
3. Select the old Group as the Animal Source Group. This is where the animals will be transferred from. You can note the Group Number to aid in locating the source Group.
4. Save the new Group.
5. Transfer animals from the old Group to the new Group, following the transfer procedure. [see To Transfer Animals that Have been Assigned to Cages]
6. ***<u>NOTE</u>**: All animals have to be removed from the old Group, before it can be hidden.*
7. Repeat this procedure for every Group that used the old ASP and needs to be renewed.

<u>To ADD Animals to a Group</u>

1. Select the Group Manager from the listing on the left
2. Select the Current Groups Tab
3. Highlight the applicable group to add animals
4. Select the Animals in Group Tab
5. Click the Add Animals Button
6. Insert the Number of Animals you are creating for this group
7. Select the Investigator name from the drop-down list
8. Select the applicable Strain from the drop-down list *[Accurate strain code assignment is an LASP requirement – 01VAR, 01Mice, etc, are not permitted for use under this screen]*
9. Select the applicable Sex from the drop-down list
10. To Add mice of both sexes at once, type in the number and letter of the first sex [i.e., 5f]. The balance of animals added will be the other sex. Example: To add 10 male and 5 female mice, put either 10m or 5f in the sex box. The sex indicated in the box will be entered first [i.e., for 15 mice – 10F and 5M – if you enter 10F first, the first 10 mice will be female and the rest male. If you enter 5M, the first five mice will be male and the rest female. The order of entry is important if you are supplying specific animal ID numbers].

    ***<u>NOTE:</u>** Designating ear tags of specific animal numbering is supported. Enter the first number in the box and each animal will increment by one. Ear tag letters can be placed in the prefix box [i.e., for 10 mice with the tag prefix "AB" and numbers 1211-1220, enter AB in* *the prefix box and 1211 in the number box. The inventory will show animal pedigree numbers AB-1211 through AB-1220. If several strains are maintained in a single group, you may want to use the change/renumber option by simply right clicking the mouse you want to change, select renumber, type the number you want to assign, and click **OK**.*

11. Insert the Birth Date [only actual birthdates are permitted]. If your facility has an exception for providing exact birth date information, **Leave this Field Blank**. If retired breeders were received from commercial sources, please approximate the birth date based on the information received from the vendor.
12. Click **OK**
13. Click **YES** to add animals

<u>To ADD Animals AND Cages at the Same Time</u>

<u>NOTE</u>*: Following this procedure when adding animals will save you the step of adding cages separately at a later time*

1. Select the Group Manager from the listing on the left
2. Select the Current Groups Tab
3. Highlight the applicable group to add animals
4. Select the Animals in Group Tab
5. Click the Add Animals Button
6. Check the "create cages" box at the top of the window and an extension box will appear on the right hand side
7. Enter the number of animals to be placed in each cage. The default number is 5 per cage.
8. Select a "cage type" from the drop-down list **[required]**
9. Select a "room number" from the drop-down list **[required]**
10. Select a "cost type" from the drop-down list **[required]**
11. Select a "Sex" for the cage [optional] **Note:** *This is **required** for indicating the sex on cage cards, when printing cages card from FACILITY.*
12. Additional information may be entered into the remaining fields in the right extension box
13. Follow steps 6-14 from above [To Add Animals to a Group] to enter the remaining required information.

<u>NOTE</u>: *The animals will be randomly assigned to the cages created, so only add animals of the same sex, when creating cages at the same time as adding animals.*

<u>To EDIT Animal Information – Single Animal</u>

1. Double click the highlighted animal to edit that animal or highlight and click the Edit Animal button
2. Make appropriate changes
3. Click **OK**

<u>To EDIT Animal Information – Multiple Animals in a Group</u>

1. Select the Animals in Group Tab
2. Click the Edit Animals button. This will open a separate window showing all animals in the Group selected.
   <u>NOTE</u>: *Changes to multiple animals can be made in this window [commonly used to change strain, birth date, pedigree prefix/suffix information]. You can quickly apply column changes to multiple animals by holding down your mouse key and dragging your mouse up/down to the applicable animals.*
3. You must click the SAVE button in the top left corner, before you Click **OK**

To Edit Animal Information – Multiple Animals in a Group – Pedigree Number

1. Select the Animals in Group Tab
2. Select and Highlight the applicable animals that you would like to change the pedigree number for [you may prefer to sort the animals to get them to group together] … you can use the shift key to highlight grouped animals or the ctrl key to select individual animals not grouped together
3. Click the right click your mouse, select the renumber option
4. Enter your starting number and each of the subsequent animals will increment by one digit
5. Click **OK** [the system will notify you if creating duplicate pedigree numbers within the same group and you may need to revise accordingly]

To DELETE Animals from a Group

1. Select the Group Manager from the listing on the left
2. Select the Group the animals are in that are to be deleted
3. Select the Animals in Group Tab
4. Select the animal[s] you would like to delete **NOTE:** *[you may prefer to sort the animals to get them to group together] … you can use the shift key to highlight grouped animals or the ctrl key to select individual animals not grouped together. You can the total number of animals you have selected in the right window near the bottom of the screen*
5. Right click on the selected animal[s]
6. Select SAC, Used, or Died as appropriate from the drop down window. **NOTE:** *Select "died" if you want to put the cause of death.*
7. Then select the date of death by clicking either Today or Date
8. If you choose DIED, after you select the date, another drop down will appear to select "cause of death"

NOTE: *To undo an action, repeat the above steps 5 and 6 and then choose UNDO under the SAC, Used, or Died option. The prior action will be undone and the animals will be returned to the group. Review the records upon completion.*

NOTE: *If animals have been assigned to a cage, they will be removed from the cage once they have been marked as DEAD and Hidden. If all animals in the cage have been marked as dead and Hidden, then the cage will automatically be removed from the cages in the list. It is good to double check to make sure that the cage has been removed.*

NOTE: *Since this data is being tracked in "REAL TIME" if animals have been euthanized the animals must be marked as DEAD and hidden in FACILITY that same day, by the END of BUSINESS that DAY.*

To View Only LIVE Animals in a Group

Animals that are dead are not removed from the Animals in Group window. To show only live animals in the group, the following can be done *[NOTE: This does not delete records only removes the dead animals from your viewing screen].* ***ONLY ANIMALS MARKED AS DEAD/SAC/USED SHOULD BE HIDDEN.***

1. Select the Group Manager from the listing on the left
2. Select the Current Groups Tab
3. Highlight the applicable group to add animals
4. Select the Animals in Group Tab
5. Highlight the applicable animals to remove from view
6. Click Hide Animals Button

7. Click **OK**

To restore a dead animal that has been hidden from the viewing screen:

1. Select the Group Manager from the listing on the left
2. Select the Current Groups Tab
3. Highlight the applicable group to restore animals
4. Select the Animals in Group Tab
5. Click Unhide Animals Button
6. Highlight the applicable animals to return to view
7. Click **OK**

***NOTE**:* *If dead animals are scattered throughout the group … sorting by disposition will bring them together.*

To VIEW Animals in Cages

1. Select the Group Manager from the listing on the left
2. Select the Current Groups Tab
3. Highlight the applicable group to add animals
4. Select the Animals in Group Tab
5. Select the Animals in Cages Tab

***NOTE**:* *This will only allow you to VIEW animals in their cages … you cannot edit any cage information from this window*

To TRANSFER Animals

This is the procedure to follow to transfer animals from one group to another without a cage. This will occur either when a new ASP is approved, or whenever it is necessary to transfer animals.

1. In Group Manager, select the Group the animals are located in that need to be transferred
2. Go to Animals in Group tab
3. Highlight the animals to be transferred
4. Click the Transfer button
5. A window will open listing Groups for the Facility listed at the bottom of the window. Check that the Facility is correct. Select the Facility and then the Group within that Facility that the animals are to be transferred into.
6. Click **OK**
7. A window will open asking if it is OK to Merge All Extended Data. Click **OK**
8. A confirmation of the Transfer will appear
9. You can go to the destination Group to check the animals
10. If the Investigator box in the upper right corner is different, it will have to be edited
11. Use the Edit Animals button to edit this information

NOTE: *When animals are transferred out of a "group" … the cages do not transfer with them. [Unless you follow steps to Transfer Animals that have been assigned to Cages] If all animals from a cage are transferred … you must go to the Cage Manager and delete the cages. Also, new cages will need to be created for the "group" that the animals were transferred into.*

NOTE: *If all Animals in one cage are being transferred the animals can be transferred In Cages, (To Transfer Animals that have been assigned to Cages)*

To Transfer Animals that have been assigned to Cages and transfer the cages

Animals that are ASSIGNED to Cages can be transferred to a different group or to a different facility. The ASSIGNED cage moves with the animals. Both breeding and holding cages can be transferred

1. Select the Group Manager from the listing on the left
2. Select the Current Groups Tab
3. Highlight the applicable group to add animals
4. Click on Animals in Cage tab
5. Highlight the cage # or #'s under cages in group screen. **NOTE:** *you can transfer multiple cages by using the shift key or individual cages using the control key. Animals being transferred will appear in the animals in Cage screen in the far right column.*
6. Click on the Transfer button in left hand column
7. Highlight Destination Group being transferred to [or if transferring to different facility select facility first then select the Group with in the facility]
8. Click **OK**
9. You must change the room number of the cages Transferred to match new room number.
10. Check for duplicated cage numbers and Renumber if necessary (see Cage Manager section)

NOTE: *You will need to know the correct cage # assigned to the animals that you want to transfer. If this information is not available, you can obtain this in the "Animals in Group" screen by following the following steps*

1. In current Groups, select the source animals group
2. Go to Animals in Group tab
3. Sort Animals by Strain, DOB, Sex, Cage # [this will put all of the animals that are in the same cage together in order]
4. Make note of the cage # or #'s of the mice to be transferred

NOTE: *If the group of mice you are transferring is utilizing the customized GROUP USER drop downs, this information is ONLY specific to the original GROUP. The populated drop downs will transfer, only IF the group the mice are being transfer to is SET UP the EXACTLY the SAME as the group being transfer from. This must be checked BEFORE transferring the mice or you must edit the information once it is transfer.*

To Change the Room number on Transfer Animals (in cages) to a different room:

In the transfer process, the room number for the cages will not automatically be updated. The room number MUST BE UPDATED manually.

1. In the Cage Manager, Highlight those cages that were transferred from a different room.
2. Click the Move Cages button.
3. Type in the correct room
4. Click **Ok**.

To Transfer Animals to a New Facility

When Animals are transferred to a new Facility, the same above steps will be followed to Transfer Animals in cages or out of cages. Except that the transfer will be entered in FACILITY by the designated Administrative staff member handling animal transfers in the facility that the animals are being transferred from.   And any appropriate forms should be completed and approved by the sending and receiving facilities.

To FIND a Group

1. Select the Group Manager from the listing on the left
2. Click the Find Group Button
3. Enter the Group Name
4. Click **OK**

To FIND an Animal

1. Select the Group Manager from the listing on the left
2. Select the Animals in Group Tab
3. Click the Find Animal Button
4. Enter the Pedigree Number
5. Click **OK**

MICROCHIP Transponder Identification

Before you are permitted to precede with microchip transponders implantations, you must submit a modification request to the applicable approved Animal Study Proposal [the form template can be found on the FACILITY webpage: http://web.ncifcrf.gov/rtp/lasp/fac/]. In addition, all new technicians performing the procedure must be certified by the LAM veterinary staff in advance. Please be sure to allow sufficient time for these requirements to be fulfilled.

To implant a microchip

1. Scan the sterilized unopened lancet assembly to verify the ten digit transponder code
2. Open the packet using sterile technique
3. Place the lancet assembly on the retractor and lock the retractor
4. Immediately before implantation, unlock the retractor and remove the lancet cap

> **NOTE***: The lancet is extremely sharp [similar to a scalpel blade] and has a long 60 degree bevel.* **NOTE***: Do not depress the plunger on the retractor before the lancet is inserted into the animal. Ejection of the transponder will occur.*

5. The implant site is prepared by clipping the fur, applying Betadine followed by an alcohol swipe. **NOTE**: This step is optional. However if the fur is not clipped, wet the fur with alcohol and part the fur prior to implant.
6. The lancet is placed at the loose skin between the shoulder blades at an acute angle of 15 to 20 degrees
7. Insert the lancet, observing yellow implant gauge (mandarin) to determine that transponder has been fully inserted

> **NOTE:** *The implant motion should be straight in and straight out. Every effort should be made to eliminate rotational movement of the hand to avoid any "wobble" of the lancet tip.*

8. Once the skin has been penetrated, pull the skin fold back over the length of the lancet while simultaneously moving the lancet forward. A steady (not abrupt) insertion of the lancet is the preferred procedure.
9. Depress the plunger using a steady motion
10. Withdraw the lancet and let the skin go
11. Check the implantation site to make sure that the transponder has been fully inserted. The skin is flattened along the injection site to remove any subcutaneous air.
12. Seal the site with a drop of surgical glue [i.e., Nexaband] or liquid bandage. A limited amount of surgical glue should be administered to alleviate adverse skin irritation.
13. Scan the animal to verify the transponder code
14. Place mouse in a clean cage

Post Implant Care

After the implant, watch the animal closely to ensure that it is moving freely and is not showing any signs of distress. The mouse must be checked daily and if any swelling and/or signs of inflammation occur, the LAM veterinary staff must be notified immediately for guidance.

To Add a Transponder Code to an Animal

1. Under the Group Manager select the Current Groups tab
2. Click on "Interface" option from the very top menu bar
3. Select "Transponder"
4. Select "Start" or "Autostart"
5. Select the group receiving a transponder code [from the Current Groups tab]
6. Select Animals in Groups tab
7. Double click on individual animal for which you would like to assign the transponder
8. Click on "Transponder" box
9. Point the Trovan reader at the scruff of the mouse
10. Depress the "red" button on the reader to scan the animal
11. While holding the button down, point the reader towards the infrared device
12. The unique 10-digit number will appear in the transponder box

To Find an Animal within a Group [by Transponder Code]

1. Under the Group Manager select the Current Groups tab
2. Select Animals in Groups tab
3. Point Trovan reader at the scruff of the mouse
4. Depress the "red" button on the reader to scan the animal
5. While holding the button down, point the reader towards the infrared device
6. The "Edit Animal" box will appear on the screen

To DELETE Animals Incorrectly Utilized Under an Approved ASP [Toolbox]

Once animals have been weaned or created, they are automatically counted against the investigators ASP usage. If animals have incorrectly been counted against an investigators ASP, you should contact Jaime Greear [Frederick] or Tina Sadr [Bethesda] for Toolbox corrections. The facility staff must provide the detailed individual animal information [protocol number, facility, group name, and the assigned animal number] in order for the change to be made.

History Log Usage

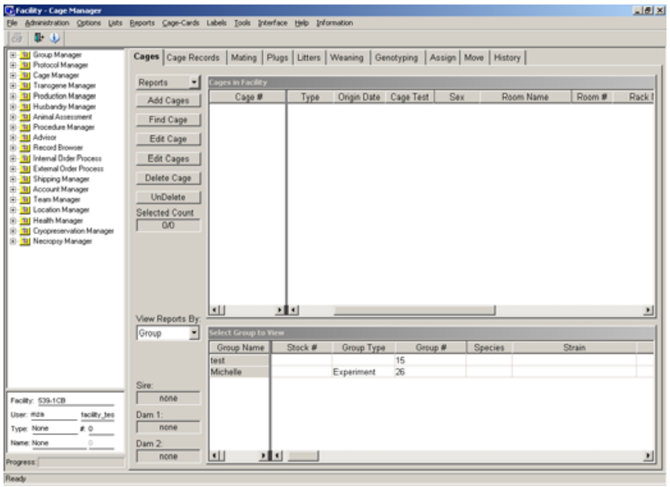
The History Log can be used to check what has been done to Animals and Cages in a Facility or a Group. Currently is has limited functionality, but improvements have been requested. This log will show the date that a change was made to the Group (an event). Items include Adding, Deleting and Transferring animals as well as cage information. The detail provided is limited, but it is useful if you want to know if you have already deleted some animals. To access the History log for a Group:

1. From ANY tab in the Group Manager, select the Reports dropdowns at the top of the Program window.
2. Scroll down to History Reports
3. Scroll over and down the next dropdown.
4. Click the report needed. The group log will be most useful.
   a. Group log - Provides history for the currently selected Group

    b. Facility log - Provides history for the currently selected Facility
    c. Group log - Provides history for the entire Campus (i.e. Frederick)
5. Most recent events are at the top of the list. Scroll to find the event you are looking for. **NOTE:** *This log does NOT provide specific animal information, only general event information*

CAGE MANAGER MODULE – GENERAL/HOLDING CAGES

This is where facility staff will create cages within each assigned animal group



To ADD Cages to a Group

1. From the Group Manager window,
2. Highlight the group of animals for which you would like to add cages
3. Select the Cage Manager from the listing on the left
4. Select the Cages Tab
5. Click the Add Cages Button
6. Insert the number of cages to create
7. Select the applicable Cage Type from the drop-down list. Must designate breeding to use for mating. All others can be holding.
8. Select the sex of the animals in the cage [this is required for the sex to appear on the printed out cage card]
9. Select the applicable Room # from the drop-down list
10. Select the applicable Cost Type from the drop-down list
11. If individually tracking animals and/or cages, insert the applicable prefix and/or suffix into the cage number so that all relevant cages are created with this information.
12. Click **OK**
13. Click **YES** to add cages to this group

NOTE: *Adding rooms and racks will be done by each facility. Cages are not assigned to racks.*

CORRECTIONS: *If you add too many cages – simply delete cages to get to the correct # of cages needed [see below for procedure]*

To Edit/ Renumber Cages/ In Cage Manager/ Cage Tab:

To edit a single cage:

1. Double click the highlighted cage to edit that cage or highlight and click the Edit Cage button
2. Make appropriate changes
3. Click **OK**

To edit multiple cages at a time [prefix/suffix; sex; type; number; etc.]:

1. Click the Edit Cages button. This will open a separate window showing all cages in the group. You can quickly apply column changes to multiple cages by holding down your mouse key and dragging your mouse up/down to the applicable cages.
2. After making changes click the SAVE button in the top right hand corner of the screen.

To Renumber multiple cages:

1. Highlight cage or cages to be renumber.
2. Right Click
3. Click on Renumber
4. At Start with Screen - type in desired # [multiple cages may be renumbered at the same time as long as the numbers are in numerical order; for example if you highlight 20 cages then right click start with #1 Cages will be renumbered 1-20.]
   NOTE: *Renumbering can also be done in the edit cages windows or when editing a single cage.*

To DELETE Cages from a Group

1. Select the Group Manager from the listing on the left
2. Select the Current Groups Tab
3. Highlight the group that you would like to delete cages from
4. Select the Cage Manager from the listing on the left
5. Scroll to find the cage(s) you need to delete
6. To select multiple cages:

A. Option 1

   i. Click on the first cage and move the mouse down to the last cage
   ii. Hold down the **SHIFT** key and left click the mouse (this will highlight the desired records). The number of cages will be shown in the small window titled **SELECTED COUNT**. The first number is the number of cages selected; the second number is the number of cages that will remain in the group.
   iii. Click the Hide button on the left-hand side
   iv. Click **YES** to delete the selected cages

B. Option 2

   i. Hold down the **CTRL** key and click on specific cages to highlight and select them. The number of cages will be shown in the small window titled **SELECTED COUNT**. The first number is the number of cages selected; the second number is the number of cages that will remain in the group.
   ii. Click the Hide button on the left-hand side
   iii. Click **YES** to delete the selected cages

C. Option 3

   i. Use either the **CTRL** or **SHIFT** keys selection option [see above] to highlight the cages you want to hide
   ii. Click the right mouse button

iii. Select the "deactivate and hide" option

NOTE: *If cages have mice assigned to them, mice must be removed from cage before hidding.*

NOTE: *When animals are assigned to a cage and the cage is emptied by deleting all of the animals in that cage. The cage will automatically be deleted from the cages in Group window of the Cage Manager.*

To UNDELETE Cages in a Group

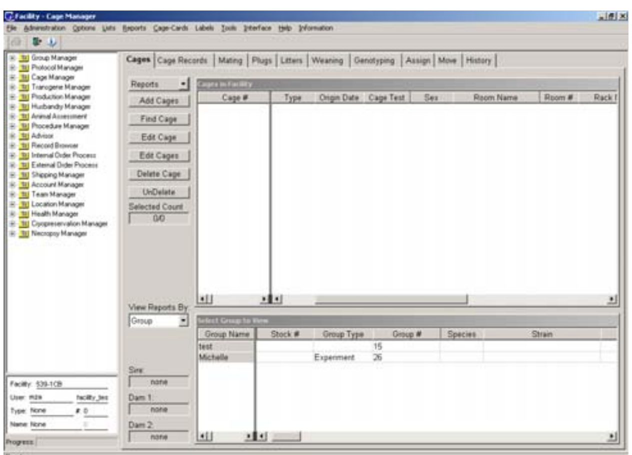
1. Select the Group Manager from the listing on the left
2. Select the Current Groups Tab
3. Highlight the group that you would like to undelete cages from
4. Select the Cage Manager from the listing on the left
5. Click the Unhide button
6. Select cage(s) to undelete
7. Click **OK** button

To FIND a Cage

1. Select the Cage Manager from the listing on the left
2. Select the Group you want to find a cage in [bottom window]
3. Click the Find Cage Button
4. Select Cage Number Bullet
5. Enter the Cage Number
6. Click **OK**

CAGE MANAGER MODULE – MATING CAGES

This is where facility staff will create breeding, mating, and check plug cages within each assigned animal group



To ADD a MATING Cage to a Group

1. From the Group Manager default screen
2. Highlight the Group of animals for which you would like to add cages or change designation from holding to mating
3. Select the Cage Manager from the listing on the left

   a. *Click the Add Cages Button to create cages or*
   b. *Change the designation of an existing cage from holding to mating*

4. Click Mating Tab
5. Select the cage number from “Select Mating Cage” window
6. Drag Male and Female from “Select Mating Cage” window
   NOTE: *The male mouse must go in the far left quadrant of cage window, the female mouse can go in the center or right quadrant of the cage window*
7. Mating cage set-up is now complete

Entering PLUG Dates for a Female Breeder

In this section of the cage manager, you are able to mark the day that your animals are mated, change the date they were mated, and add a plug date. This will automatically adjust for an expected delivery date.

1. Select the Cage Manager from the listing on the left
2. Click the Breed/Plugs Tab
3. Highlight the cage number from the “Mating Cage” window
4. Highlight the female in the “Females in Breeder Cage” window
5. Double click the date to bring up the calendar and enter the date the female was mated or plugged, DOB, sex, strain, or other information associated with the litter

CREATING a Litter

1. Select the Cage Manager from the listing on the left
2. Click Litters Tab
3. Highlight cage number from “Cages” window
4. Click the Create Litter 1 button
5. The “Create New Litter” window will appear and you can enter the number of pups in litter, DOB, sex, strain, or other information associated with the litter
6. If the whole litter dies, mark all pups as dead and hide them or subtract all of the pups
7. One all pups have been marked as dead Click the Clear Litter button

NOTE: ***DO NOT USE THE CLEAR LITTER BUTTON BEFORE MARKING THE PUPS as DEAD***. *This will NOT mark the pups as dead, it will only hide them. If a litter dies, you must mark pups as “dead” and then hide them. If only a few of the pups are dead before weaning, then the “-“ [minus] button can be used to correct the number of pups in the litter.*

WEANING a Litter

1. Go back to Cages tab - Cages must be created before you can wean the mice [1 cage for males, 1 cages for females]. Also designated which cage is male and which cage is female when setting up the cages.
2. Click Weaning tab
3. Click which cage in the “From Cage” window you want to wean from
4. Click which cage in the “To Cage” window you want to wean into
5. Click and drag animals from “Animals to Be Weaned” window into “Weaned Animals” window
6. Once all animals are weaned, the following message will appear “All litter 1 [or 2] have been deleted from this cage, would you like to delete the information”
7. Click **Yes**

NOTE: *Once you wean animals, you cannot return them to the mating cage. The pups must be weaned into a cage.*

GENOTYPING Animals

A. Option 1 :
NOTE: *This can only be used before pups are weaned and when they are marked for Genotyping when the litter was created.*

1. Select the Cage Manager from the listing on the left
2. Click Genotyping Tab
3. Click the “Cage to Genotype” window
4. Then click on the cage you want to enter genotyping
5. Click the Edit Genotypes button
6. Enter genotypes then click the Save button

A. Option 2

1. Select the Cage Manager from the listing on the left
2. Select the Animals in Group Tab
3. Click the Edit Animal button if you only have one genotype to enter. Click the Edit Animals
4. button if you have multiple genotypes to enter.
5. Under the genotype column, you can click the column and a drop down window will appear
6. with the various genotypes to choose from
7. Select the appropriate genotype for each animal
8. Click the Save button if you are working in the “edit animals” window … Click the **OK** to
9. save changes when working in the “edit animal” window

MOVING Animals Between Cages

1. Select the Cage Manager from the listing on the left
2. Select the Move Tab
3. Select the cage that animals are currently located [they will be in the upper left window on the screen]. **NOTE:** *Once the cage is selected/highlighted, the animals in that cage will appear in the upper right window on the screen.*
4. Select the cage that the animals are to be moved into in the bottom left window [any animals currently in this cage will appear in the bottom right widow]
5. Highlight animals to be moved [upper right window] and then click and drag them to the lower right window
6. Click **OK** to move animals

NOTE*: Moving animals out of the cage will not delete/remove cage, if the cage is empty you must manually hide it.*

ASSIGNING Animals to Cages

NOTE*: Only use the Assign Tab [in Cage Manager] when animals have never been in a cage [i.e., when animals have been added to a group without being put into a cage].*

1. Select the Cage Manager from the listing on the left
2. If cages for animals do not already exist [please see instructions above for To ADD cages to a group]
3. If cages already exist, Click on the Assign Tab
4. Select the cage the animals are going to be assigned to [the window on left side of screen]
5. Select the animals that are going to placed into the cage from the top right screen [you can do multiple animals at one time by holding down the control key while clicking on the animals]
6. Select and drag the highlighted animals into the cage [bottom right screen]

7. Click **OK** to assign animals to cage

NOTE: *Animals can only be assigned to cages designated as "holding" cages. To add to breeding cages you must use the Mating Tab*

Viewing LITTER History

This option permits you to view all litters born for a particular group. You will see the litters sorted from the first born to the most recent litter born.

1. Select the Cage Manager from the listing on the left
2. Select the applicable group from the "Select Group to View" window at the bottom of the screen
3. Click on the Litter History Tab

Viewing MATING History

This option permits you to view all mating cages in a particular group. You will also see when pups were subtracted/added from a litter, or when dams/sires were removed from a cage.

1. Select the Cage Manager from the listing on the left
2. Select the applicable group from the "Select Group to View" window at the bottom of the screen
3. Click on the Mating History Tab
4. Select the applicable cage from the "cages" window on the left hand side of the screen

To FIND a Cage

1. Select the Cage Manager from the listing on the left
2. Select the group that you would like to search for cages within
3. Click the Find Cage Button
4. Highlight "Cage Number" option
5. Enter the cage number you are looking for
6. Click **OK**

Printing CAGE CARDS [Supplemental]

1. Log on to the Supplemental program
2. Click on the Cage Cards button on the right-hand side of the window
3. Select the type of card you want to print

   - *Experiment Card 001*
   - *General Stock Card 001*

4. A new window will open asking you to select the cage card printer.
5. Select the appropriate printer and click **OK**
6. The window shows five boxes
7. Select a group from the upper left hand box
8. Select a strain
9. Select a birth date
10. Click the Seed Card button [the card will fill with information for the selected animals]. ***NOTE:*** *Any information may be changed if desired on this card, but it will not be saved [if the birth date is wrong, it can be corrected for the cards, but will need to be properly corrected through FACILITY].*
11. Enter the animal sex

12. Enter the number of animals that will be in the cage in the box
13. Other fields can be completed as needed [such as source, received date, cage number, technical notes, etc.]
14. Enter the number of cards to be printed [all cards will be alike, differing only in the card # at the bottom of the card]
15. Click the Print Cards button. If there are any fields to be filled you will be prompted to fill them before proceeding.
16. A window will ask to confirm the sex and number of cards requested. Click **OK** to begin printing.
17. To print additional cards: Select another group, strain and birth date and click Seed Card if needed
18. When finished printing cards click the red "X" box in the upper right hand corner of the window
19. You will be prompted to reset the regular printer before leaving the cage card program
20. Select the printer and click **OK**

If more than one copy of the same cage card is needed

1. Before you print cards go to "File" and "Print Set Up"
2. At the "Print Set Up" Window, click on "Set Up"
3. Double click "Paper/Output"
4. Click "Copies" and select amount of copies needed
5. Click **OK**
6. Click OK again at the "Printer Set Up" Window
7. Select Print Cards

NOTE: *When filling information out on your card, in the section on the card that asks for the number of cards only put "1" in this section on Both Experimental Card 001 or General Stock Card 001.*

NOTE: *After you are done you have to remember to go back thru the same instructions and change everything back to one copy.*

Printing Cage Cards [FACILITY]

1. Select the Group Manager from the listing on the left
2. Select the Current Groups Tab
3. Select the group that you would like to print cage cards for
4. Select the Cage Card option from the Tool Bar [top of screen]
5. A drop down window will appear and select which type of cage card you would like to print
6. Once in the "Print Cage Cards" window, select the applicable cage in the right window that cards will be printed for [the card will appear with all information filled in, in the window on the left side]
7. Click **Print**

NOTE*: If this is your first time printing, click on select printer first to make sure the correct printer has been selected]*

NOTE*: If you want to print multiple cage cards from that animal group, when you select the cage in the right window, use the "Ctrl" key as you click on the cages [highlighting multiple cages] then click print and all cages selected will have a cage card printed.*

NOTE: *Currently the cage card in FACLITY that have been found to provide adequate information is the holding card under FLAC (in the cage card drop down) and the breeding card in BCCRC*

Printing Cage Cards [Zebra Printer – Troubleshooting Tips]

If you have problems with your Zebra cage card printers, try the following quick fixes. If these do not solve the issue, please contact the computer help desk for guidance:

- *Check and clear any perforations that have jammed inside the printer*
- *Open the machine and clean the inside with pen that was provided with zebra printer or alcohol pad.*
- *Make sure paper size has not changed in printer set up. To check follow directions above for making more than one copy of the same cage card to get to printer set up. Under Paper/Output, paper size should be 3x5 cage cards.*

Installation of Barcode Fonts

NOTE: *This only needs to be done if your printed caged cards do not have a barcode in the upper left corner of the card.*

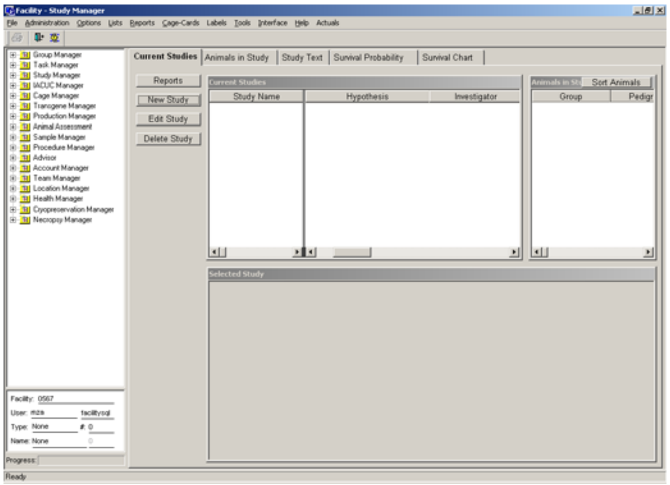
In order to view/print barcodes in FACILITY, there are 2 fonts that are needed (3OF9_NEW and Barcod39). While they are on most computers, some do not have them pre-installed.

Check system for presence of necessary fonts
1. In FACILITY, select any cage card in the NCI list. All of these cards are designed with barcodes.
2. Click a cage and look at the card that appears.
3. If a barcode (vertical black lines) is there, the needed fonts are in the computer and no further action is necessary
4. If, in the upper of lower edge of the card, there is a series of letter and numbers in a large size type, and NO barcode, then the fonts are not currently installed.

Font Installation
1. Open My Computer
2. Open the network M: drive (it should be named: fas on 'Mis-nt1')
3. Open the Facility Folder
4. Open the Fonts Folder
5. Select and Copy both Fonts (3OF9_NEW and Barcod39)
6. Go back to the My Computer window
7. Open the Local Disk C:
8. Open the WINDOWS Folder
9. Open the Fonts Folder
10. Paste the copied fonts into this folder
    a. If the system indicates that the fonts installed correctly, or there is no message, proceed to #11
    b. If a window with the following error message appears - “The ‘*name of font*’ font is already installed. To install a new version, first remove the old version” (if both fonts already exist there will be 2 messages):
        i. Search the Windows / Fonts folder and delete the font(s) you just tried to install (3OF9_NEW and/or Barcod39)
        ii. Then again paste the copied fonts into the WINDOWS Fonts folder
11. Close this window and check the installation by going back through Step 1 (FACILITY must be closed and restarted first)

STUDY MANAGER MODULE

This module is utilized to track various procedures and experimental studies that are covered by approved Animal Study Proposals



General

1. Click the New Study button to open a "Create New Study"
2. Edit the underlined title by typing over it ["Name" by Default]
3. Add additional study information in the Study Text tab
4. Click on Animals in Study tab. **NOTE:** *You must use this tab to assign animals to a study.*

Animal Assignments to Studies

Group Assign

1. Click the Group Assign button to assign animals to the currently selected study. A new window will appear.
2. Select a group from the list at the bottom of the window
3. Choose one or more animals from the "Animals to Assign from Group" list
4. Drag them to the "Animals Assigned to Study" list
5. Remove animals from the study by dragging from the "Animals Assigned to Study" list to the "Animals to Assign from Group" list

Session Assign

1. Click the Session Assign button to access a list of sessions and the animals within the sessions
2. Assign animals following the procedures from the "Group Assign" instructions above

Random Assign

1. Select the study you wish to assign animals
2. Click the Random Assign button to open a new assignment window
3. Choose a group from the "group list" in the bottom of the window
4. Enter the desired number of animals in the box to the right of the assign button
5. Click the Assign button and the chosen number of animals will appear in the "Animals Assigned to Study" list. **NOTE**: *Animal count shows how many animals are currently assigned.*

Entering Study Text

1. Select the Study Text tab for the study you wish to work with
2. Click the Edit button to open an editing window for study text
3. Enter text into the provided space by typing directly or by copy and pasting from a pre-formatted source [i.e., experimental protocol, ASP text, etc.]
4. Format the text using the Format drop-down menu at the top of the box
5. Click the Save button to preserve your edit or changes
6. Click the OK button to close this window
7. Click the Cancel button to exit the window without saving changes

Survival Probability Analysis

1. Mark the animals as "dead" on the Animals in Group tab of the Group Manager
2. Assign animals to your studies for analysis to occur
3. View survival by age or from a certain date
4. Select the Curve tab to display the survival probability for one selected study. **NOTE**: *You can quickly switch between probability views.*
5. Create a graph line using the Survival Chart tab
6. Use the Export button to export data on survival probability in .cvs format

NOTES:

- *If survival mode is set to date, enter a date from which the probability starts calculation.*
- *If the survival mode is set to age, enter the age in days and the animal death is calculated automatically.*
- *Recalculate updates the probability view every time you change the age, date, or study for the selected curve tab.*

Survival Chart - Graph Comparing Survival Rates

1. Select at least two studies to perform the analysis
2. Go to the Survival Probability tab
3. Select the Curve 1 tab
4. Select study using the drop-down list
5. Choose either date or age for your calculation
6. Select the Curve 1 tab to view statistics
7. Select the Curve 2 tab and select second study
8. Go to Survival Chart tab and verify both studies are present
9. Click the Print button to send the displayed chart to a printer
10. Click the Calculate button to bring up the graphs for the selected information

REPORTS

There are several options for report printing [1] FACILITY; [2] Supplemental; and [3] the LASP Animal Facility and Animal Study Proposal Access System.

FACILITY Reports

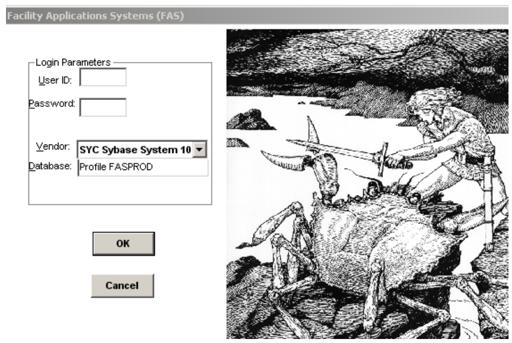
For all modules in FACILITY, there are two options for reports [1] under the top menu, there are history [group log, facility log, global log], facility, and global report features available. If you do not have access to these and are interested in the features, please contact Jaime Greear [greearj@mail.nih.gov] for guidance; and [2] under each "manager" function [and most of the sub-tabs], there is a Report[s] Button that will permit filter/search/sort functions that can either be formatted and printed from FACILITY or can be exported to Excel. You can save the report layouts that you have designed by selecting “Save Layout” and retrieve the layout at any given time by selecting “Open Layout.”

Reports can be emailed directly from FACILITY to individuals. When in the report field you can click on the EMAIL tab at the top of the page and it will pull up the email application. **NOTE:** *If individuals are not available for selection contact Jaime Greear [greearj@mail.nih.gov]*

Reports can also be sorted and saved, so that the data can be retrieved at a later time or opened into an EXCEL file.

SUPPLEMENTAL Reports

The reports in “Supplemental” extract information entered into the FACILITY database for specific reports created for LASP.



After logging into the “Supplemental” program [you will need to be provided with a username and password, along with having the application installed on your computer], you are provided with the following facility-specific reports [menu options are on the right hand side]:

Rpt001 – Locations: This report shows the number of racks and cages that will fit in each room. This is used to calculate capacities and % usage reports elsewhere. Requests for changes to this report are submitted to DMS. This information should be checked an updated whenever the number or type of racks in a room changes.

Rpt006 – Current Cage Inventory (Uplist):
Rpt006-Current Cage Inventory (Uplist)-Cage # listed
RPT006-Current Cage Inventory (Uplist)- Cage # listed (strain order)
NOTE: *All report 006 can be used to perform a physical inventory of a room. It has space to record numbers of animals and cages.*

*Rpt007 – Room Usage – Cages **
*Rpt008 – Room Usage – Animals **
Rpt009 – Group Report
Rpt012 – Labor – Employee Order
Rpt013 – Labor – Account Order
Rpt018 – Inventory by Account
Rpt004 – Animal Usage by Original Protocol

*Rpt081 – Shared Service *Review* - Cage **
*Rpt087 – Shared Service *Review* - Other*
*Rpt086 – Shared Service *Review* - Labor ***

* *These reports are submitted weekly for billing*

** *This report is submitted for labor billing*

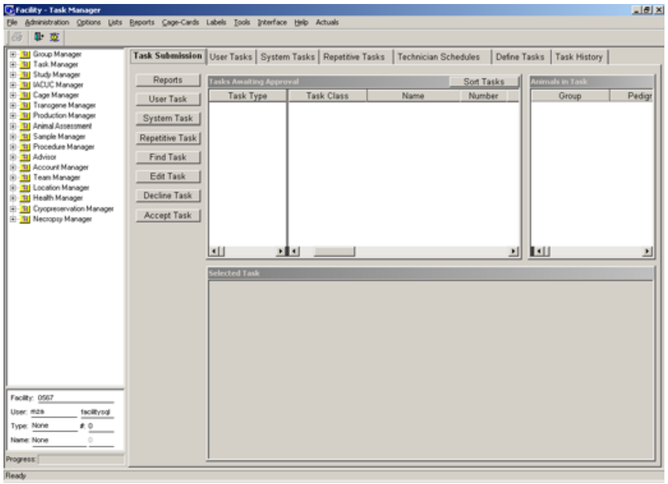
LASP Animal Facility and Animal Study Proposal Access System

The reports available through the online *LASP Animal Facility and ASP Access System* are available to investigators, post-docs, technicians, administrative, and management staff. Specific security permissions are designed to ensure that only the information pertinent to the different users is accessible. These reports can be copied [Ctrl-C] and pasted [Ctrl-V] into Word or Excel by selecting the on line text of interest and copying [Ctrl-C], opening Word or Excel, and pasting [Ctrl-V] into the applicable program. This will permit search/sort/hide functions to send detailed reports to investigators. These features at some point will also be integrated into the online system itself to enhance the customization of the data. Currently, the following reports are currently available online for use:

- *ACUC Active Proposals*
- *Animal Facility Report [General Overview with Room Details]*
- *Individual Animal Report*
- *Individual Animal Report [Death Log]*
- *User Report*

TASK MANAGER MODULE

This module is utilized to create pre-defined tasks related to experimental studies for completion by facility staff members

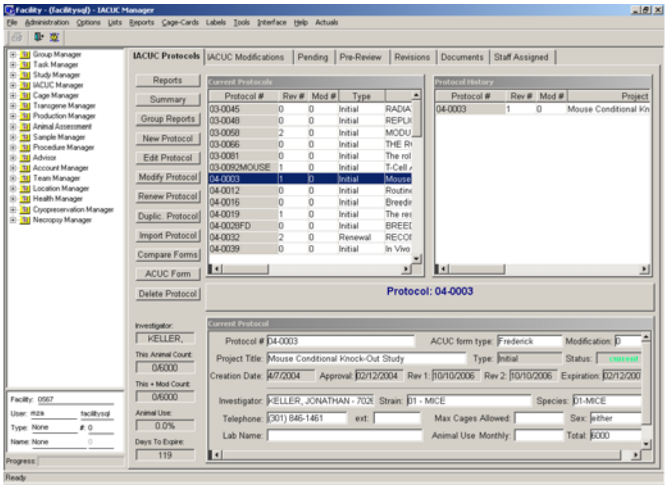


To Define, Assign, and Complete Tasks

1. Select the Task Manager from the listing on the left
2. Select the Define Tasks tab
3. Click the Edit Lists button to create drop down list for your user-defined fields
4. Click the Add List button
5. Enter your defined task [i.e., tail vein injection, bleed]
6. Click the Save button and then click **OK** to exit the Edit Lists window
7. Click the User Task button to open a new Define Task window
8. Enter the Task into the definition field
9. Enter additional information into User Defined Item Name
10. Choose the corresponding lists for the Selection List
11. Click **OK** to save the task type. The task will appear under the Available Tasks window.
12. Select the Task Submission tab
13. Click on the User Task button
14. Set the Task Type to your defined task [i.e., Bleed]
15. Name the Task [i.e., Bleed 1]
16. Select the desired values for the tasks from the provided drop down lists
17. Use either the Assigned Animals from Group or the Assign Animals from Session button to assign animals to the task
18. Drag animals from the group or session window to the Animals Assigned to Task window
19. Drag animals in the opposite direction to remove them
20. Click **OK** to save changes
21. Click **OK** to submit task. The task will appear under Tasks Awaiting Approval window.
22. Click the Accept Task button to approve the task. It will be sent to the User Task tab.
23. Click the Decline button to remove the task.
24. Click the Cancel Task button to cancel the selected task. It will appear on Task History tab as "Canceled."
25. Select the task and click on the Complete Task button once a task has been performed. It will be marked as "Completed."

IACUC MANAGER MODULE

This module is utilized to maintain and track all ACUC related protocol records



DESIGNATIONS for use in IACUC Manager

ASP Type	Frederick		Bethesda	
Parent	01-0001 *(7 digits required for inventory report)*		ASB-00001 *(9 digits required for inventory report)*	
Multi-species	01-0002Mouse	01-0002Rat	ASB-00002Mouse	ASB-00002Rat
Multi-facility	01-0003	01-0003FA1	ASB-00003N37	ASB-00003N10
Modification	01-0004M1		ASB-00004M1	

To ACCESS the IACUC Manager

The database is designed to be facility specific. Therefore, you must select the facility for which you are accessing to create new proposals, modifications, etc.

1. Double-click the Group Manager from the left-hand module listing
2. Click the Select Facility Button
3. Highlight the facility for which you will be working
4. Click **OK**
5. Double-click the IACUC Manager from the left-hand module listing
6. Click **OK**

<u>To ADD a New Protocol</u> ***<u>[NOTE: These instructions are for when the new ASP form import function is activated – in the meantime follow current procedure which will skip the associated "Import Protocol" steps]</u>***

1. After selecting the facility you are accessing … Select IACUC Manager on the left-hand side
2. Select the IACUC Protocols Tab
3. Click the Import Protocol Button
4. Select the protocol file for importation [protected Word template]
5. Click **OK**
6. Enter the assigned Protocol Number
7. Select **Frederick OR Bethesda** as the Form Type from the drop-down list
8. Enter the Project Title
9. Select the appropriate Investigator from the drop-down listing … DO NOT manually type an investigator's name into this space
10. Enter the investigator's phone number
11. Select the appropriate Strain from the drop-down listing
12. Select the appropriate Species from the drop-down listing
13. Select the appropriate Sex from the drop-down listing
14. Enter the number of animals requested for Years 1, 2, and 3 (these entries will be tallied under total)
15. Click **OK**
16. Click **YES** to save as a pending protocol – *NOTE: the protocol will remain in a pending status until an approval is granted by the ACUC*
17. The document will be displayed in the window for review/revision
18. After review/revision, select **File and Save** from the menu bar
19. After the document has been saved, close the Word application by clicking the **"x"** in the upper right hand corner.
20. You will now find the pending protocol under the Revisions tab

<u>To ADD a New Multi-Facility Protocol</u>

For multi-facility protocols, the protocol must be entered into each of the facilities for which the study will be utilized [please refer to the instructions for "Add a NEW Protocol"]. The primary protocol will be the first facility listed on the protocol form. All other facilities will be secondary protocols and should be identified with the appropriate suffix [please refer to designations for use in the IACUC Manager]. Animal numbers [Years 1, 2, and 3] should ONLY be included on the primary protocol.

<u>To ADD a New Multi-Species Protocol</u>

For multi-species protocols, you will need to enter a separate protocol for each species [please refer to the instructions for "Add a NEW Protocol"]. Each species should be identified with the appropriate suffix [please refer to designations for use in the IACUC Manager]. Enter the number of animals for the selected species that have been requested for Years 1, 2, and 3 (these entries will be tallied under total). *For example, a protocol requests to utilize a total of 300 rats and 100 mice. For the rat protocol, your animal total should equal 300 and for the mouse protocol your total should equal 100.*

To EDIT a Protocol - PRIOR TO APPROVAL

This feature should be used to insert **pre-review and ACUC comments** prior to final approval.

1. After selecting the facility you are accessing … Select IACUC Manager on the left-hand side
2. Select the applicable Tab [Revisions, Pre-Review, Pending] for which the protocol you would like to revise is currently being maintained
3. Highlight the protocol number for which changes are needed
4. Click the ACUC Form Button
5. The document will be displayed in the window for review/revision
6. Make the necessary revisions
7. Select File and Save from the menu bar
8. After the document has been saved, close the Word application by clicking the "**x**" in the upper right hand corner
9. Once all changes have been made, click the applicable "to" ["to pre-review" or "to pending"] button and move protocol the protocol to the next tab in the review process

To EDIT a Protocol – APPROVED STUDIES ONLY

This feature should only be used to make **administrative changes** after approval [i.e., data-entry and/or typographical error by IACUC Coordinator].

1. After selecting the facility you are accessing … Select IACUC Manager on the left-hand side
2. Select the IACUC Protocols Tab
3. Highlight the protocol number for which changes are needed
4. Click the Edit Protocol Button
5. Make the necessary changes
6. Click **OK** to edit the protocol

NOTE*:* *The protocol must also be changed on the "group" to which the facility has assigned the study. To do this please contact the individual responsible for the data-entry in the facility and inform them of the edit that has been made so that they can make necessary correction to the assigned "groups".*

To ASSIGN STAFF to a Protocol

1. After selecting the facility you are accessing … Select IACUC Manager on the left-hand side
2. Select the Assign Staff Tab
3. Highlight the protocol number on the left-hand side for which you would like to assign staff
4. Click Assign Staff button
5. Highlight the staff from the left-hand side that you would like to assign to the protocol
6. Transfer the staff to the right-hand side
7. Click **OK** to transfer these staff members

NOTE: *The staff members you are planning to assign must be entered into the system under the Team Manager for selection*

<u>To MODIFY a Protocol</u>

This feature is used to track official ACUC modifications submitted by an investigator to his/her approved protocol. The programmer is currently working to install a feature that will allow importation of Word templates for modifications. Until this has been completed, you should follow these instructions for modifying an approved protocol.

1. After selecting the facility you are accessing … Select IACUC Manager on the left-hand side
2. Select the IACUC Protocols Tab
3. Highlight the protocol number to be modified
4. Click the Modify Protocol Button
5. Make the necessary changes
6. Click **OK** to modify the protocol

<u>NOTES:</u> *You will now proceed as if you are proceeding with a new protocol … (1) the modification will remain in a pending status until an approval is granted by the ACUC; (2) you will now find the pending protocol under the Revisions tab; (3) please also refer to the Add Documents to a Protocol section.*

To keep consistent records, complete the following fields as instructed below:

- *<u>Protocol Number:</u> 01-0001**M1** or ASB-001**M1***
- *<u>Protocol Type</u>: For Bethesda, be sure to select the "modification" form type*
- *<u>Project Title:</u> **ADDENDUM: State the addendum that is occurring** (i.e., requesting an increase in the number of animals)*
- *<u>Animal Numbers:</u> If no animals are being added under the modification, **DELETE** current animal numbers [if applicable]. If animals are being added, fill in the number of animals to be **ADDED** as applicable.*
- *<u>Expiration Date:</u> Please ensure that the modification expiration date is the same as the expiration date for the parent protocol. A request has been made to see if the programmer can make the date default to the parent protocol expiration date.*
- *<u>Review Dates:</u> Please place "00/00/00" for the two review dates when approving the modifications. A request has been made to delete these fields since they are not applicable to modifications.*

<u>To ADD DOCUMENTS to a Protocol</u>

This should be utilized to **attach modifications** until the programmer has installed the importation feature. You may also add any other pertinent electronic documents for reference.

1. Select the Documents Tab
2. Select the parent protocol [Mod#=0] from the "All Protocols" window
3. Click the Add Document Button
4. Cut and paste the modification request into the screen
5. Type the protocol modification reference number [*01-0001**M1** or ASB-001**M1***] under the **Name** space provided
6. Click **OK** and **Save**

To VIEW an Approved Modification

1. After selecting the facility you are accessing … Select IACUC Manager on the left-hand side
2. Select the IACUC Protocols Tab
3. Highlight the protocol number for which you would like to view a Modification
4. Select the IACUC Modifications Tab
5. Double-click the modification for which you would like to view.

***NOTE**: If you would like to view the text document associated with the modification, you will need to access the Documents Tab and select the applicable parent protocol*

To EDIT an Approved Modification

This feature should only be used to make **administrative changes** after approval [i.e., data-entry and/or typographical error by IACUC Coordinator].

1. After selecting the facility you are accessing … Select IACUC Manager on the left-hand side
2. Select the IACUC Protocols Tab
3. Highlight the protocol number for which you would like to view a Modification
4. Select the IACUC Modifications Tab
5. Click the Edit Protocol Button
6. Make the necessary changes
7. Click **OK** to edit the modification

To RENEW a Protocol

The programmer is currently working to install a feature that will allow importation of Word templates for renewals. Until this has been completed, if a form importation is required, you should follow the instructions for adding a new protocol [be sure to delete the renewed study after approval]. If a form is not available for importation, please follow these steps:

1. After selecting the facility you are accessing … Select IACUC Manager on the left-hand side
2. Select the IACUC Protocols Tab
3. Highlight the protocol number to be renewed
4. Click the Renew Protocol Button
5. Make the necessary changes
6. Click **OK** to renew the protocol
7. Click **YES** to save as a pending protocol – **NOTES**: *(1) the protocol will remain in a pending status until an approval is granted by the ACUC; (2) you will now find the pending protocol under the Revisions tab to process in the same manner as a new study.*

To DELETE a Protocol

1. After selecting the facility you are accessing … Select IACUC Manager on the left-hand side
2. Select the applicable Tab [IACUC Protocols, Revisions, Pre-Review, Pending] for which the protocol you would like to delete is currently being maintained
3. Highlight the protocol number that you wish to delete
4. Click the Delete Protocol Button
5. Click **OK**
6. Click **YES** to delete the selected protocol

NOTE: *Currently there is not an undelete button for the protocol manager, so please be cautious when deleting protocols. If there is a need to recover a "deleted" protocol, please contact the NCI-Frederick ACUC Coordinator.*

To COMPARE Protocol Forms

This feature is currently under review for redesign by the programmer.

To VIEW the Protocol Form for a Particular Study:

1. After selecting the facility you are accessing … Select IACUC Manager on the left-hand side
2. Select the appropriate TAB (i.e., IACUC protocol, revisions, pre-review, pending) for which you would like to view the protocol
3. Select the appropriate protocol that you would like to view
4. Select the ACUC Form Button
5. When finished viewing the form, save and close the document.

To Run REPORTS for the IACUC Manager:

These instructions are for reports that are needed on an infrequent basis. Formal reports that are run on a weekly/monthly/yearly basis may be designed by DMS. *NOTE: The protocol reports are not facility specific, so it does not matter which facility you are currently logged under.*

1. From the IACUC Manager, select the IACUC Protocols tab
2. Select the Reports button

To HIDE Fields: When designing a report for the first time, you will select all of the fields that you do not want to see. To do this, use your mouse button and CTRL keypad button to highlight all of the FIELDS that you do not want to include in your report. Once you have selected all of the fields, click the Hide button at the top of the box.

To SAVE a Layout: If you want to save the layout you have just created by hiding fields, click the Save Layout button. Type in the name of the layout file you have just created and click the OK button.

To TRANSFER the data to EXCEL: If you would like to work with the data in a spreadsheet form, select the Save As button at the top of the screen. Type in the name of the ".csv" file you have just created and click the OK button. *NOTE: It is recommended that you create a folder on your hard drive to save all of your ".csv" files for easy retrieval.*

Next, go into Excel and open the ".csv" file you just created. Then select Save As from the drop-down menu and name the Excel file with an ".xls" extension. *NOTE: It is recommended that you create a folder on your hard drive to save all of your ".xls" files for easy retrieval.*

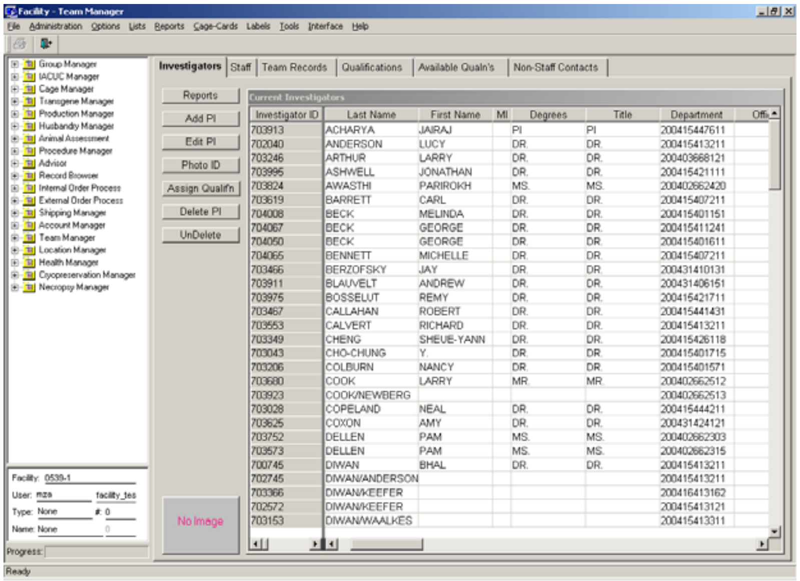
After you have saved the file in Excel, you may edit, sort, format the spreadsheet as necessary. If you have any questions regarding reports, please contact the NCI-Frederick ACUC Coordinator for guidance. Some reports will [or can upon request if deemed appropriate] be created in the supplemental system by DMS computer staff.

To DELETE Animals Incorrectly Utilized Under an Approved ASP [Toolbox]

This feature is handled by the Bethesda [Tina Sadr] and Frederick [Jaime Greear] FACILITY database coordinators. The facility staff must provide the detailed individual animal information [protocol number, facility, group name, and the assigned animal number] in order for the change to be made.

TEAM MANAGER MODULE

This module is utilized to maintain all individuals [investigator and staff] listed on approved protocols in conjunction with his/her contact and qualification records.



To ADD a Principal Investigator (PI)

Principal investigators can only be added by Sherry Stockman-Crummitt … Do **NOT** manually enter investigator names into the Team Manager

To DELETE a Principal Investigator (PI)

Principal investigators can only be added by Sherry Stockman-Crummitt … Do **NOT** manually enter investigator names into the Team Manager

To ADD a Staff Member – SAIC EMPLOYEES ONLY

SAIC staff can only be added by Sherry Stockman-Crummitt … Do **NOT** manually enter SAIC staff employees into the Team Manager

To ADD a Staff Member – NON SAIC EMPLOYEES ONLY

This feature should only be used to add [non SAIC] staff members that are listed on approved protocols or for which training documents are being recoreded.

1. Select the Team Manager on the left-hand side
2. Select the Staff Tab
3. Click the Add Staff Button
4. Enter the employee last name
5. Enter the employee first name
6. Enter the employee e-mail address
7. Enter the employee office phone number
8. Enter the employee building and room number under address (i.e., 539/244)
9. If this is a new staff member, select the hire date using the pop-up calendar
10. Click **OK** to add staff member

To DELETE a Staff Member - NON SAIC EMPLOYEES ONLY

This feature is only available to Pam Dellen

To TRANSFER an SAIC Staff Member to a Different Facility

SAIC technical staff can only be transferred by Sherry Stockman-Crummitt

To ASSIGN QUALIFICATIONS to a Staff Member

This feature is only available to Pam Dellen

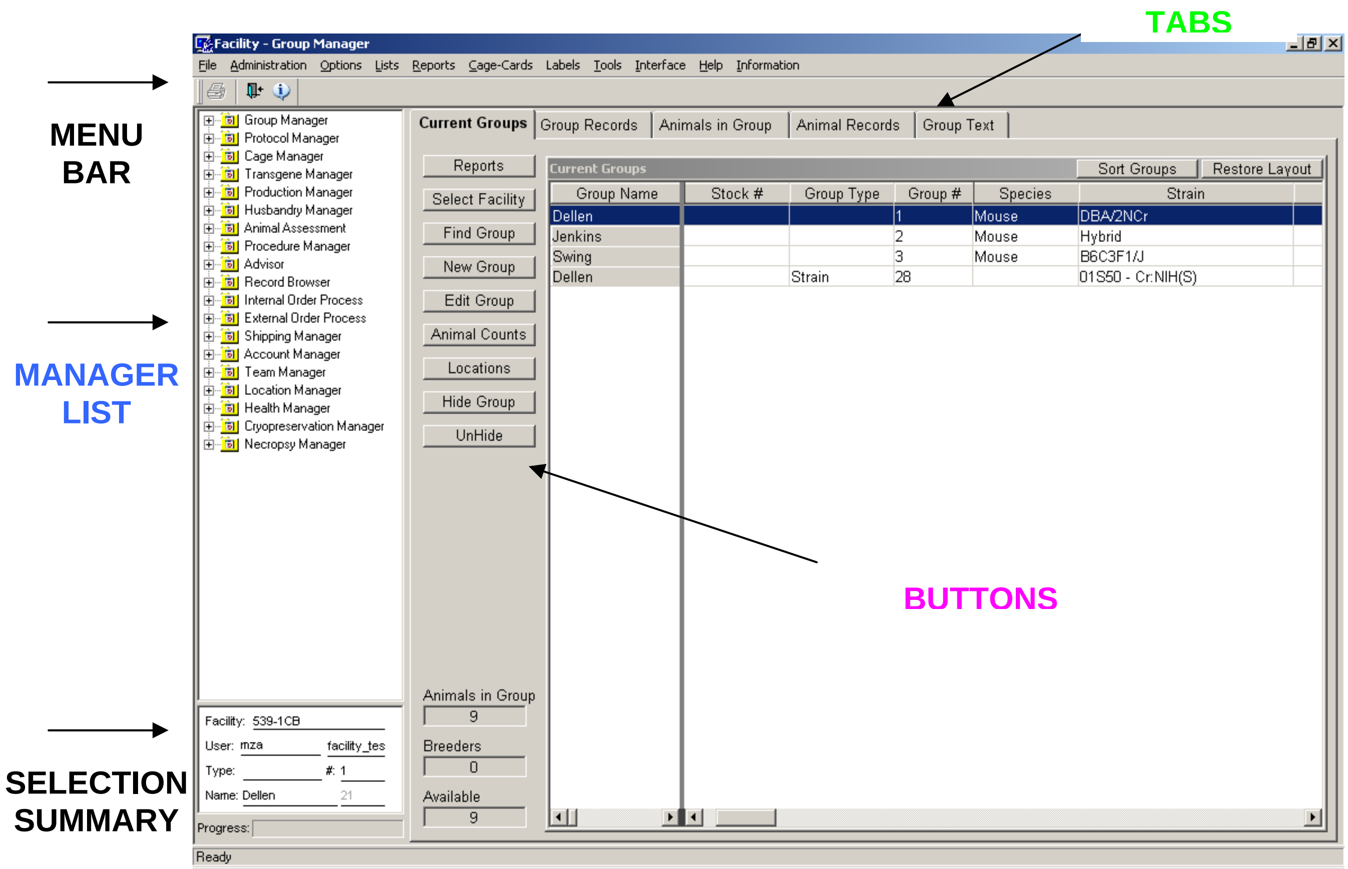
FACILITY – To add, edit, or delete AVAILABLE QUALIFICATIONS

This feature is only available to Pam Dellen

FACILITY REPORTS – Staff Qualifications for an Individual

Refer to the LASP training site. http://web.ncifcrf.gov/rtp/lasp/intra/lasp.asp

GENERAL SCREEN OVERVIEW



DATA-ENTRY FLOWCHART