CU Boulder – Topaz Elements

TOPAZ | Elements

PI & Associates Guide

Last Updated: 2018-10-24

Preface:
This guide provides an overview of how manage a research protocol.

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1. Lab/Classroom/Field Use Protocols

The following sections explain how to manage a research protocol in Topaz. The tutorials cover all of the submissions you will be required to submit throughout the lifetime of the study to include: an original protocol, interim review(s), amendment(s), and renewal(s).

- **New Protocol** – A **new protocol** is the first submission of your study. In an original protocol you are submitting new research for its first approval period. You will only have one original protocol throughout the lifetime of a study.

  Submission Interval: Once – upon initial research proposal or upon the expiration of "Transition" protocol.

- **Interim Review** – An **interim review** protocol is used to provide an annual progress report when the study is not due for its three-year renewal. At interim review it is possible to submit any amending changes to the original protocol.

  Submission Interval: Annually for the two years following initial approval or renewal.

- **Renewal** – A **renewal protocol** is submitted every three years following initial approval (i.e. year three of approval, year six of approval, year nine of approval, etc.). During renewal you can make amending changes to the original protocol, if desired.

  Submission Interval: Every three years following initial approval.

- **Amendment** – An **amendment protocol** should be submitted if you need to make changes to an approved study. You can submit an amendment at any time during the lifetime of the study. If your study is nearing interim review, you can simultaneously submit any amending changes in that submission.

  Submission Interval: No time constraints; submit as needed.
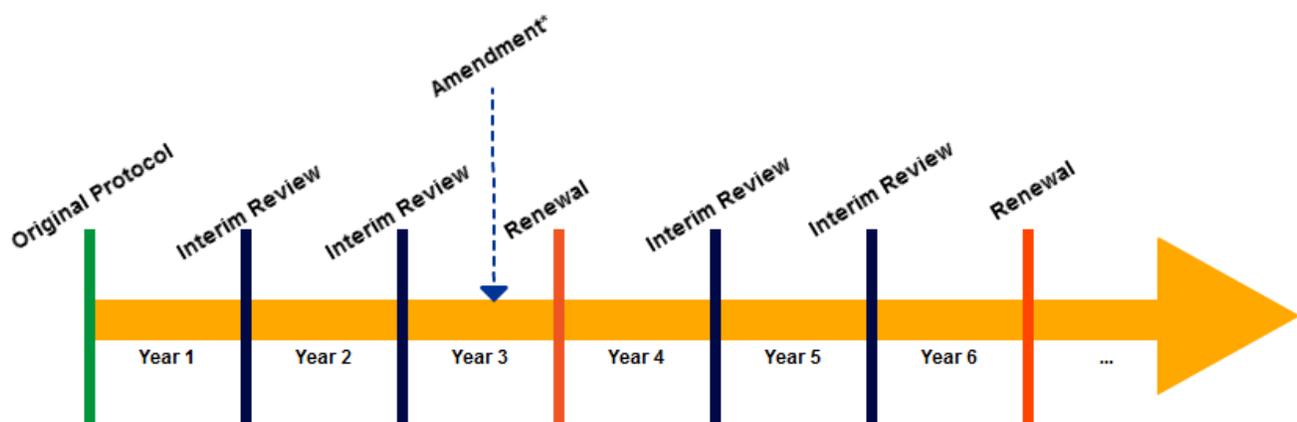
* An amendment can occur at any time during the lifetime of a study.

![University of Colorado Boulder](CU logo)

Original Protocol

A **new** protocol is the first submission for your study. In an original protocol you are submitting new research for its first approval period.

Step 1: Go to the Topaz login page at https://animalprogram.colorado.edu.

- o **VPN:** To access Topaz from **off-campus**, you must **sign into the VPN** (i.e. Cisco AnyConnect).
- o **PC Users**: On PCs, the browser still supporting the Silverlight plug-in necessary to run Topaz is **Internet Explorer.** – Also, do not confuse **Microsoft Edge** with **Internet Explorer**, see Microsoft Edge is NOT Internet Explorer.
- o **Mac OS users**: If you are a Mac user and require access to TOPAZ, you will need to use the VMware Horizon Client.

Step 2: Under *Compliance* click on **Animal Protocols**.

Step 3: Hover (with your cursor) over *Protocols* and a menu will appear. Select **Create Original Protocol**.

Step 4: The screen will refresh. In the *Select Form* window, select **Field Study Protocol** or **Lab/Classroom Use Protocol**.
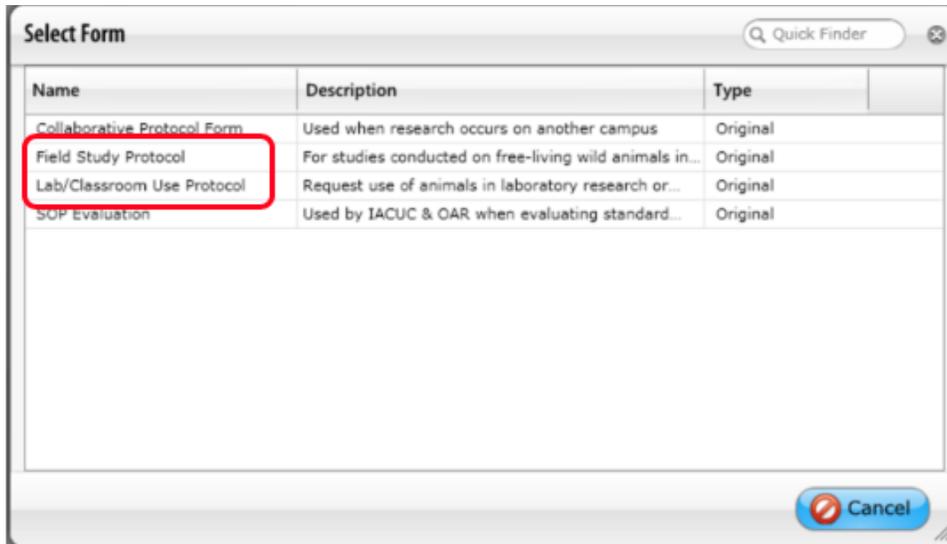
Name	Description	Type	
Collaborative Protocol Form	Used when research occurs on another campus	Original	
Field Study Protocol	For studies conducted on free-living wild animals in...	Original	
Lab/Classroom Use Protocol	Request use of animals in laboratory research or...	Original	
SOP Evaluation	Used by IACUC & OAR when evaluating standard...	Original	

Select Form — Quick Finder

Cancel

Navigating the Form

Step 1: Once you have selected the form, the protocol screen will display with an Outline of the sections and the corresponding questions.

Step 2: Complete the questions in each section. Some sections will include segments that must be completed, they are denoted with a red asterisk ✳ .Click on the **Next** button to advance to the next section. When finished, click the **Save** button.
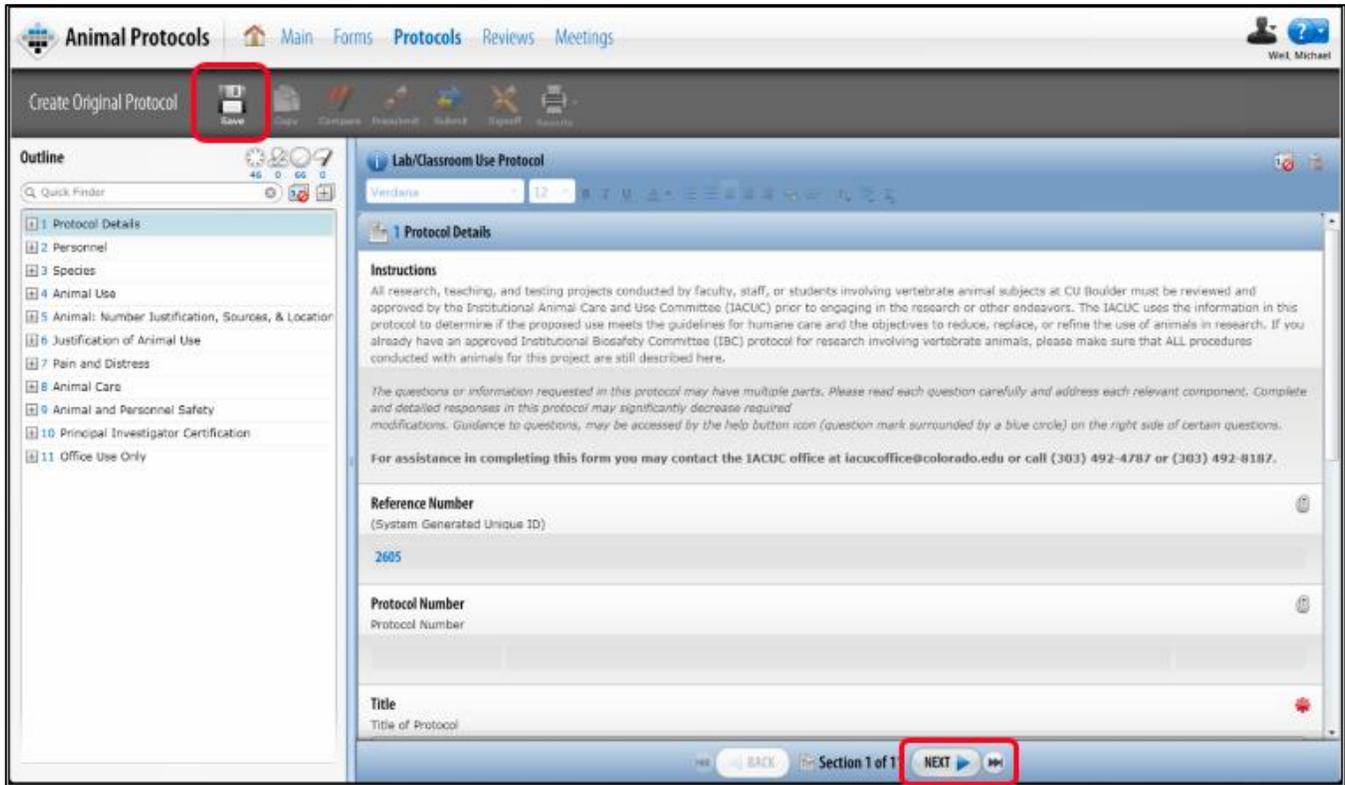
Step 3: Complete the questions in each section. Some sections will include segments that must be completed. Click on the **Next** button to advance to the next section. When finished, click the **Save** button.

✳	The **Required** icon indicates that the question you are on must be completed in order to submit the form.
📎	The **Attachment** icon indicates a question that you can upload an attachment.
➕	The **Add** icon indicates an element that you can add additional information.
🖼	The **Add Image** icon indicates that you can attach an image to the corresponding section.

Completing the Original Protocol

Step 1: Sections 1 and 2: Protocol Details and Personnel – In these sections you will enter information about study personnel and funding. Adding personnel under **Protocol Associates** (section 2) allows you to specify staff members who will be working on the protocol. You will use the Staff Select grid to designate whether a staff member is co-investigator, key associate, or authorized to order animals. The people entered here will be available for selection later in the form.

Co-investigators have the same access privileges as the PI. If none of the boxes are checked then the staff member is considered an "other associate"; other associates are only able to view the approved protocol.

Step 2: Section 3: Species – Complete this section to report the species that will be used in the study. The numbers in this section must match what you will enter per pain category or the highest level pain category an animal will experience.

Example: If you order 300 animals at Category C but 100 of them will start at B then eventually end in D. You cannot pick experimental Pain Category B for those 100.

- **Scenario 1**: Only experience Category B
- **Scenario 2**: Only experience Category C
- **Scenario 3**: Will Experience B then C

In Topaz:
- Choose the highest category
- Explain transition in Sequence and Timing in Experimental Group

Select animals at highest pain category they will experience throughout the experiment.

Under the **Species Selection** click the ⊕ icon. A Species selection window will appear. Locate the desired species in the list and click the ⊕ icon to add it to the keep list. When your list is complete, click the **OK** button. – The Species selection window will close.
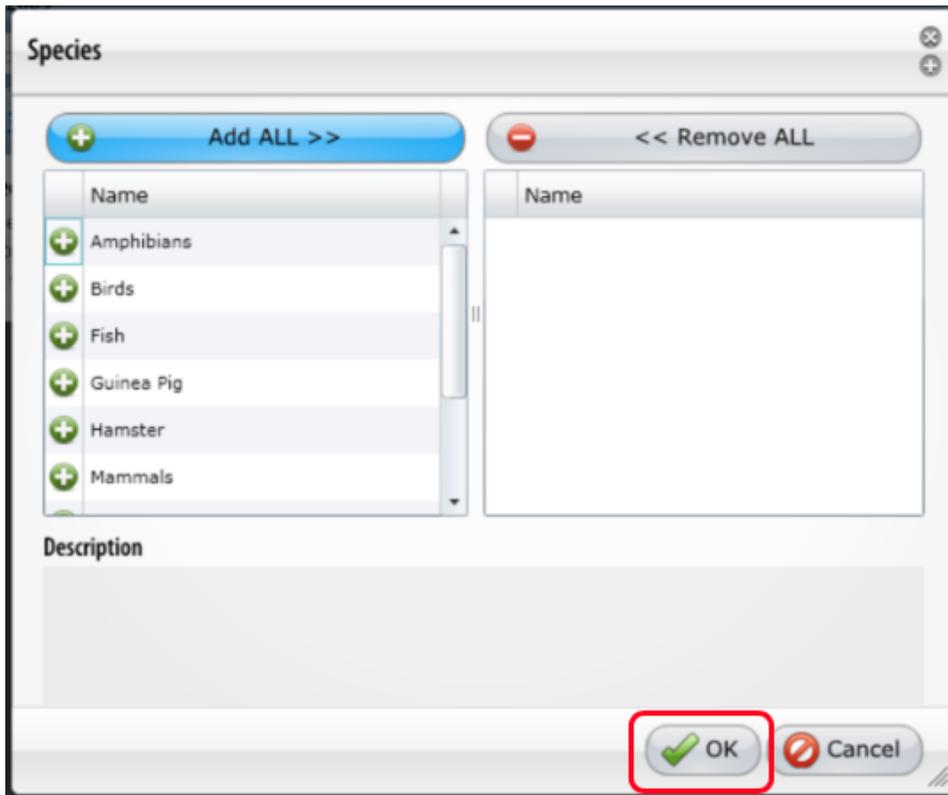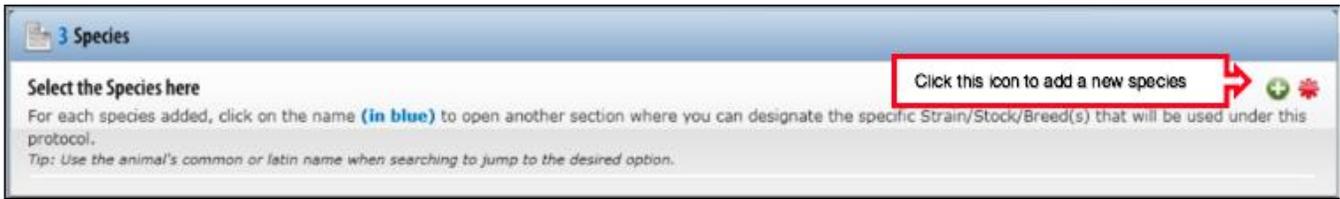
On the protocol screen, you will see a list of species you selected. Click the **Show Segments** button. The first segment (i.e. the first species listed) will load. Complete all fields, as appropriate.

a. **Strain/Stock Breed**

   i.   For each species you must select a Strain/Stock/Breed. The Strain/Stock/Breed subsection is the first question of the segment.

   ii. Click the ⊕ icon. The Strain/Stock/Breed selection window will appear. Locate the desired strain/stock/breed in the list and click the ⊕ icon to add it to the keep list. When your list is complete, click the **OK** button. – The Strain/Stock/Breed selection window will close.
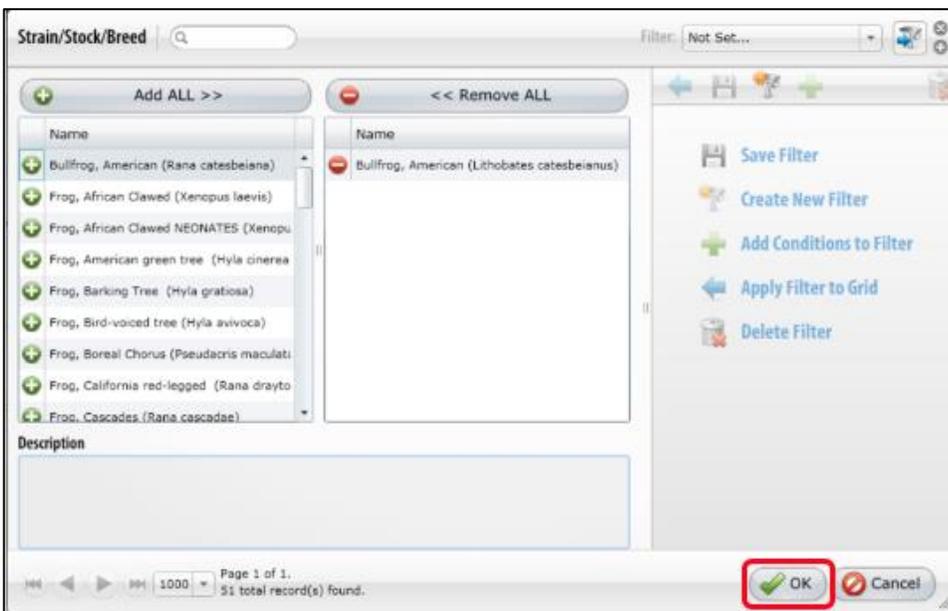
b. Click the **Save** icon. Click the **Show Sections** button. Complete any remaining segments (i.e. additional species segments). Click the **Next** button.

Step 3: Section 4: Animal Use – Enter the Abstract, any agents, breading and more. Click the **Save** button. Click the **Next** button.

Step 4: Section 5: Animal: Number Justification, Sources & Location – Enter the facility where animals will be housed and answer the remaining questions. Click the **Save** button. Click the **Next** button.

Step 5: Section 6: Justification of Animal Use – Complete all fields to explain the rationale for animal use in this study. Click the **Save** button. Click the **Next** button.

Step 6: **Section 7: Pain and Distress** – Complete all fields to explain the and pain and distress during this study. Click the **Save** button. Click the **Next** button.

Step 7: **Section 8: Animal Care** – Enter the personnel responsible for the daily care of the animals, if it will be the OAR staff please state that. In the Special Care section select and of the check boxes that will be required for this protocol. – Click the **Save** button. Click the **Next** button.

Step 8: **Section 9: Animal and Personnel Safety** – Disclose any concerns or procedures that may affect animal or personnel safety as well as the status of you and your research team's conflict of Interest disclosures. In the "Additional Safety and Regulatory Reviews" select all that apply. – Click the **Save** button. Click the **Next** button.

Step 9: **Section 10: Principal Investigator Certification** – Read and complete the certification. Click the **Save** button.

Step 10: You have completed the original protocol application. Click the **Submit** button. The form will be checked for errors. – [If any required items have not been completed, you will not be able to save. A *Save Failed* box will appear showing your errors. Click **OK** and **Cancel**. Use the ✳ button in the Outline to address any problem areas.]

Step 11: Click **Set Status**. Then, in the *E-Signature Information* window, enter your **IdentiKey User Name** and **Password**. Click **Save**.
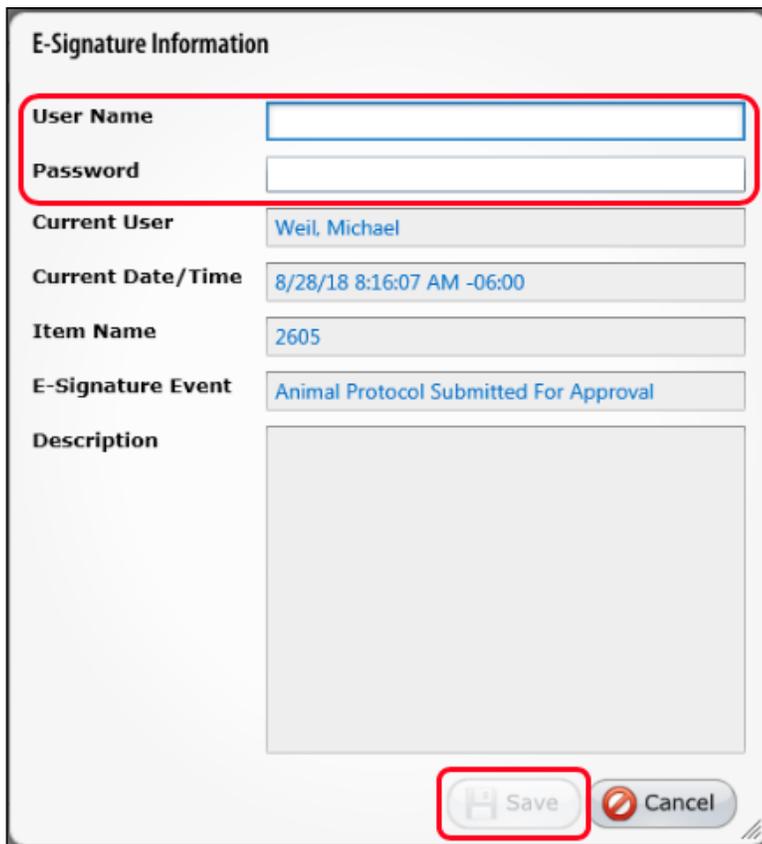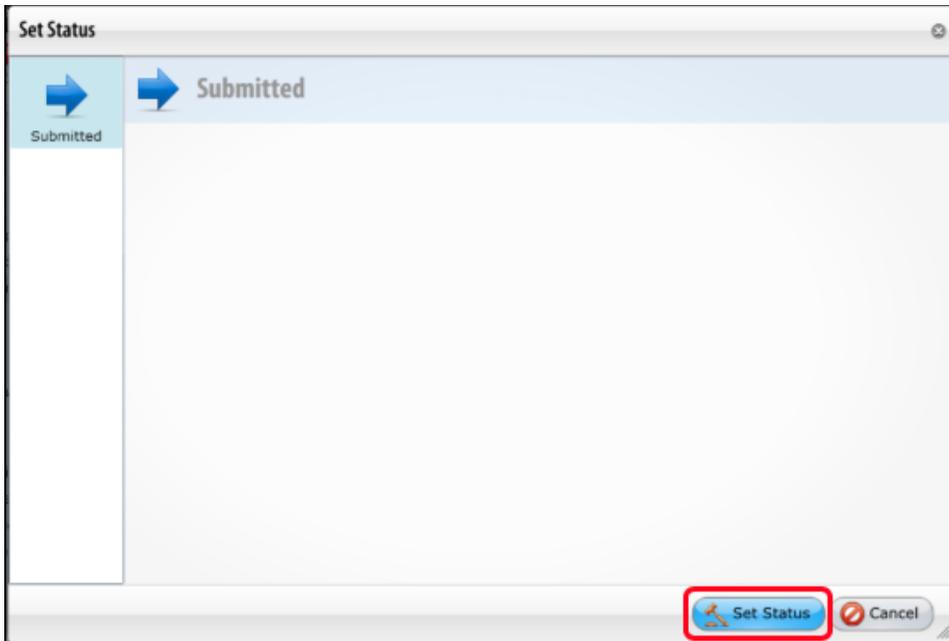
Step 12: In the *Animal Protocol Submitted for Approval* window, click **Send** to email your protocol to the IACUC office.

Annual/Interim Review

An **interim review** protocol is used to provide an annual progress report when the study is not due for its three-year renewal. At interim review, it is possible to submit any amending changes to the original protocol.

Step 1: Go to the Topaz login page at https://animalprogram.colorado.edu.

- o For your Internet browser it is recommended to use Safari, Internet Explorer, or Mozilla Firefox v52. – You will need to run or install Silverlight to access Topaz. (How to install Mozilla Firefox v52.)
- o User experience is *greatly influenced* by the browser in use.
- o Bookmark this page for easy access later.
- o Login with your CU IdentiKey and password.

Step 2: Under *Compliance* click on **Animal Protocols**.

Step 3: Hover (with your cursor) over *Protocols* and a menu will appear. Select **Create Interim Review Protocol**. – The screen will refresh and display the *Select Protocol For Interim Review* window with a list of your protocols that are eligible for an annual review.

- • Troubleshooting Tip: If your protocol does not display, it is likely that a review or amendment has already been started. To check, click **Open Unsubmitted Protocols** from the *Protocols* menu.

Step 4: Select the desired protocol and click the **OK** button. – The window will close and a *Select Form for Interim Review* window will appear.

Step 5: Select **Lab/Classroom Use Protocol – INTERIM/ANNUAL REVIEW**. (If this applies to a Transition protocol, the form will be called Transition Protocol – INTERIM/ANNUAL REVIEW.

- The menu will close and the screen will display the protocol screen with an Outline of the sections and corresponding questions. The interim review will include the information you submitted with any previous submissions. It will also include a new section called *Annual Review Questions*.

Step 6: Complete the questions in **Section 1: Annual Review Questions**.

	The **Required** icon indicates that the question you are on must be completed in order to submit the form.
	The **Attachment** icon indicates a question that you can upload an attachment.
	The **Add** icon indicates an element that you can add additional information.
	The **Add Image** icon indicates that you can attach an image to the corresponding section.

- If you submitted an annual review for this protocol for the previous year, this field will populate with the previous content. It is expected that you OVERWRITE the former content. (The content from the previous review is SAVED as another version of this protocol, so you will not be losing this content if deleted.)

- If there were any changes that are considered an administrative change, edit any of the original sections that are affected. Administrative changes include:
  - Less than 15% change in animal numbers from original protocol, strain, or variety if there are no animal health issues
  - funding source
  - typographical
  - personnel other than PI
  - animal source
  - IACUC approved location

a. **Protocol Status:** Confirm whether you wish to continue the study or permanently close it. If this is your third annual review, do not complete this form. Go to **Protocols > Create Renewal Protocol** in the top navigation bar to complete the renewal form instead.
b. **Problems/Adverse Effects:** Describe if there were any unanticipated problems or adverse events, morbidity or mortality, the cause(s) if known, and how these problems were resolved.
c. **Changes made to this protocol in the past year:** Explain whether there had been any changes made to the protocol within the past year.
d. **Permits or research conducted at another institution:** If this protocol involves permits or any research conducted at another institution, attach annual review approvals or updated permits to this section.
e. **Animals:** Confirm if you have enough animals for the research you are planning in the coming year.

Step 7: You have completed the interim review application. Click the **Submit** button. The form will be checked for errors. – [If any required items have not been completed, you will not be able to save. A *Save Failed* box will appear showing your errors. Click **OK** and **Cancel**. Use the ✱ button in the Outline to address any problem areas.]

Step 8: Click **Set Status**. Then click **Submit**, again. [Fix any required items.]

Step 9: Click **Set Status**, again. Then, in the *E-Signature Information* window, enter your **IdentiKey User Name** and **Password**. Click **Save**.

Step 10: In the *Animal Protocol Submitted for Approved* window, click **Send** to email your protocol to the IACUC office.

Amendment

An **amendment** should be submitted if you need to make changes to an approved study. You can submit an amendment at any time during the lifetime of the study. If your study is nearing interim review, you can simultaneously submit any amending changes in that submission.

Step 1: Go to the Topaz login page at https://animalprogram.colorado.edu.

- o For your Internet browser it is recommended to use Safari, Internet Explorer, or Mozilla Firefox v52. – You will need to run or install Silverlight to access Topaz. (How to install Mozilla Firefox v52.)
- o User experience is *greatly influenced* by the browser in use.
- o Bookmark this page for easy access later.
- o Login with your CU IdentiKey and password.

Step 2: Under *Compliance* click on **Animal Protocols**.

Step 3: Hover (with your cursor) over *Protocols* and a menu will appear. Select **Create Amendment Protocol**. – The screen will refresh and display the *Select Protocol For Interim Review* window with a list of your protocols that are eligible for an annual review.

- Troubleshooting Tip: If your protocol does not display, it is likely that a review or amendment has already been started. To check, click **Open Unsubmitted Protocols** from the *Protocols* menu.

Step 4: Select the desired protocol and click the **OK** button. – The window will close and a *Select Form for Amendment* window will appear.
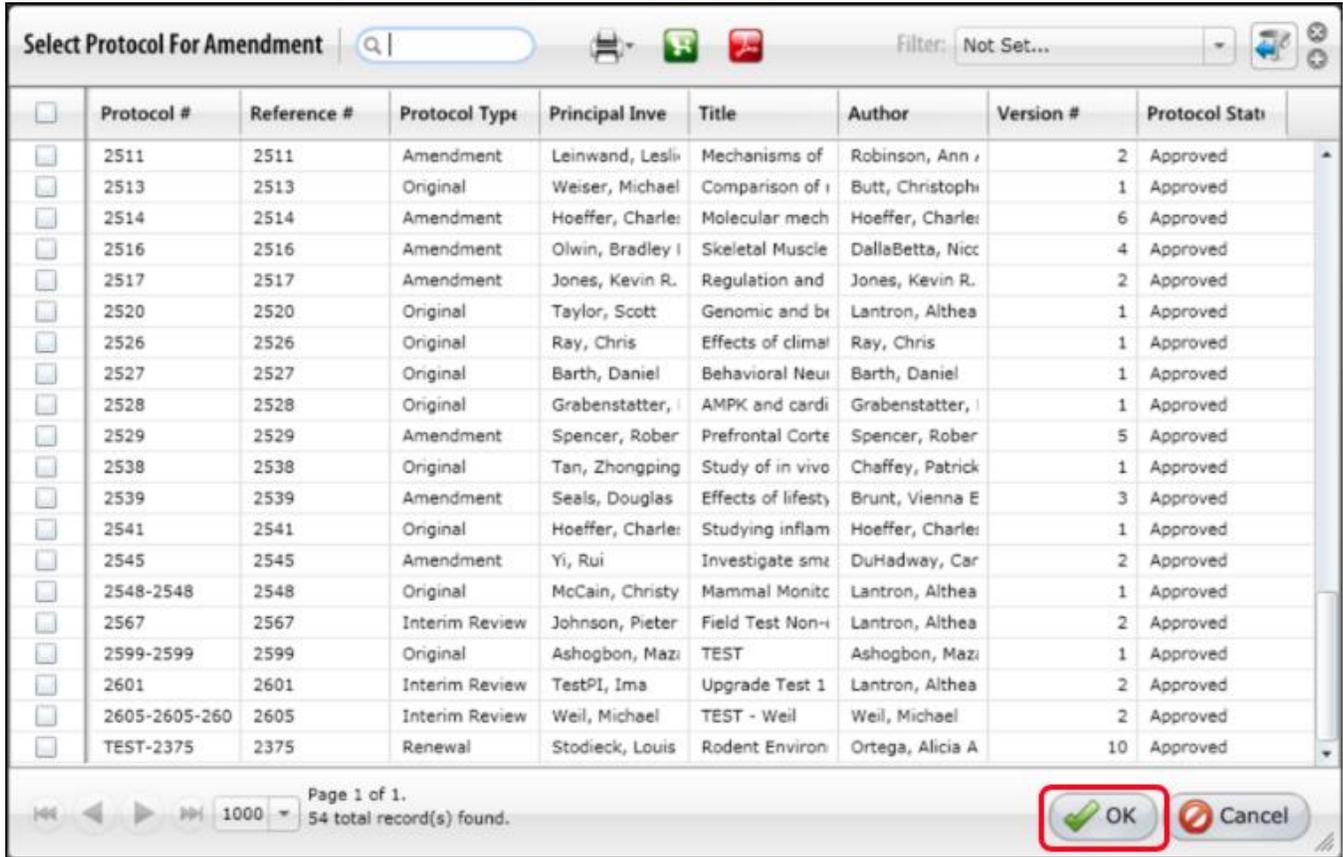
	Protocol #	Reference #	Protocol Type	Principal Inve	Title	Author	Version #	Protocol Stat
☐	2511	2511	Amendment	Leinwand, Leslie	Mechanisms of	Robinson, Ann	2	Approved
☐	2513	2513	Original	Weiser, Michael	Comparison of	Butt, Christophe	1	Approved
☐	2514	2514	Amendment	Hoeffer, Charles	Molecular mech	Hoeffer, Charles	6	Approved
☐	2516	2516	Amendment	Olwin, Bradley I	Skeletal Muscle	DallaBetta, Nicc	4	Approved
☐	2517	2517	Amendment	Jones, Kevin R.	Regulation and	Jones, Kevin R.	2	Approved
☐	2520	2520	Original	Taylor, Scott	Genomic and be	Lantron, Althea	1	Approved
☐	2526	2526	Original	Ray, Chris	Effects of climat	Ray, Chris	1	Approved
☐	2527	2527	Original	Barth, Daniel	Behavioral Neur	Barth, Daniel	1	Approved
☐	2528	2528	Original	Grabenstatter,	AMPK and cardi	Grabenstatter,	1	Approved
☐	2529	2529	Amendment	Spencer, Rober	Prefrontal Corte	Spencer, Rober	5	Approved
☐	2538	2538	Original	Tan, Zhongping	Study of in vivo	Chaffey, Patrick	1	Approved
☐	2539	2539	Amendment	Seals, Douglas	Effects of lifesty	Brunt, Vienna E	3	Approved
☐	2541	2541	Original	Hoeffer, Charles	Studying inflam	Hoeffer, Charles	1	Approved
☐	2545	2545	Amendment	Yi, Rui	Investigate sma	DuHadway, Car	2	Approved
☐	2548-2548	2548	Original	McCain, Christy	Mammal Monito	Lantron, Althea	1	Approved
☐	2567	2567	Interim Review	Johnson, Pieter	Field Test Non-	Lantron, Althea	2	Approved
☐	2599-2599	2599	Original	Ashogbon, Maz	TEST	Ashogbon, Maz	1	Approved
☐	2601	2601	Interim Review	TestPI, Ima	Upgrade Test 1	Lantron, Althea	2	Approved
☐	2605-2605-260	2605	Interim Review	Weil, Michael	TEST - Weil	Weil, Michael	2	Approved
☐	TEST-2375	2375	Renewal	Stodieck, Louis	Rodent Environ	Ortega, Alicia A	10	Approved

Select Protocol For Amendment — Filter: Not Set...

Page 1 of 1. 1000 — 54 total record(s) found. ✔ OK ⊘ Cancel

Step 5: Select **Lab/Classroom Use Protocol – AMENDMENT**. (If you are submitting an amendment for a Transition protocol, the form will be called *Transition Protocol – AMENDMENT*.)

Select Form for Amendment — Q Quick Finder
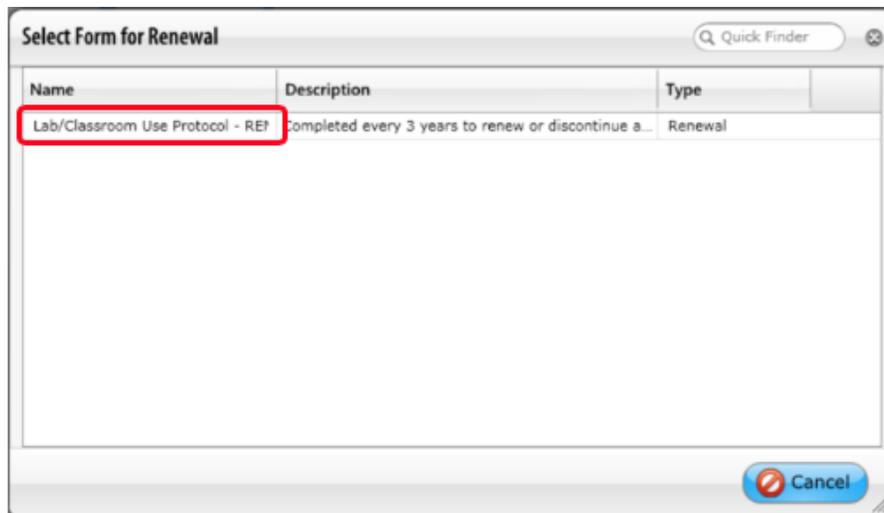
Name	Description	Type	
Lab/Classroom Use Protocol - AMI	Submit to request amendment to protocol	Amendment	

⊘ Cancel

- The menu will close and the screen will display the protocol screen with an Outline of the sections and corresponding questions. The amendment will include the information you submitted with your Original protocol. It will also include a new section called *Amendment*.

Step 6: Complete the questions in **Section 1: Amendment**.

	The **Required** icon indicates that the question you are on must be completed in order to submit the form.
	The **Attachment** icon indicates a question that you can upload an attachment.
	The **Add** icon indicates an element that you can add additional information.
	The **Add Image** icon indicates that you can attach an image to the corresponding section.

- If you have submitted an amendment to this protocol in the past, this field will populate with the previous content. It is expected that you OVERWRITE the former content. (The content from the previous amendment is SAVED as another version of this protocol, so you will not be losing this content when deleted.)

    a. **List the proposed changes to the protocol** **–** Briefly list each proposed change. Only enter one change per line (i.e. hard return after each listed item). Do not describe changes here. Edit any of the original sections if it will be affected by the addendum.

    b. **Clinical illness, pain, distress, or other health issues** – Confirm whether or not you expect the animals to experience illness, pain distress, or other health issues as a result of this addendum. If yes, you will need to modify **Section 6.5** of the *Study Objectives* to explain. If a new procedure, add a new pain Category D or E and you must conduct a new literature search for the new procedure. Report the databases used in your literature search.

    c. **Other concerns**

    d. **Potentially adverse events**

Step 7: Update the remaining protocol sections as needed.

NOTE: Do NOT delete any previous information from these sections UNLESS you are removing it from the protocol. If anything is deleted, it will no longer be approved.

Step 8: You have completed the renewal application. Click the **Submit** button. The form will be checked for errors. – [If any required items have not been completed, you will not be able to save. A *Save Failed* box will appear showing your errors. Click **OK** and **Cancel**. Use the ✳ button in the Outline to address any problem areas.]

Step 9: Click **Set Status**. Then click **Submit**, again. [Fix any required items.]

Step 10: Click **Set Status**, again. Then, in the *E-Signature Information* window, enter your **IdentiKey User Name** and **Password**. Click **Save**.

Step 11: In the *Animal Protocol Submitted for Approved* window, click **Send** to email your protocol to the IACUC office.

Submit A Renewal (Every 3 Years)

A **renewal** protocol is submitted every three years following initial approval (i.e. year three of approval, year six of approval, year nine of approval, etc.). During renewal you can make amending changes to the original protocol, if desired.

NOTE: If the expiring protocol is a **Transition** protocol, i.e. created outside of Topaz and converted from a PDF, you must submit an Original Protocol. You cannot renew transition protocols because the converted form only contains basic identifying information.

**Step 1:** Go to the Topaz login page at https://animalprogram.colorado.edu.

- o For your Internet browser it is recommended to use Safari, Internet Explorer, or Mozilla Firefox v52. – You will need to run or install Silverlight to access Topaz. (How to install Mozilla Firefox v52.)
- o User experience is *greatly influenced* by the browser in use.
- o Bookmark this page for easy access later.
- o Login with your CU IdentiKey and password.

Step 2: Under *Compliance* click on **Animal Protocols**.

Step 3: Hover (with your cursor) over *Protocols* and a menu will appear. Select **Create Renewal Protocol**. – The screen will refresh and display the *Select Protocol For Interim Review* window with a list of your protocols that are eligible for an annual review.

- • Troubleshooting Tip: If your protocol does not display, it is likely that a review or amendment has already been started. To check, click **Open Unsubmitted Protocols** from the *Protocols* menu. If so, you must delete or submit the form in progress before creating a new protocol.

Step 4: Select the desired protocol and click the **OK** button. – The window will close and a Select Protocol for Renewal window will appear. (The window will be empty if you try to renew a Transition protocol because you cannot renew a transition protocol. please submit an Original Protocol.)

Step 5: Select **Lab/Classroom Use Protocol – RENEWAL**. – The menu will close and the screen will display the protocol screen with an Outline of the sections and corresponding questions. It will also include a new section called *Renewal*.

- The menu will close and the screen will display the protocol screen with an Outline of the sections and corresponding questions. The interim review will include the information you submitted with any previous submissions. It will also include a new section called *Annual Review Questions*.

Step 6: Complete the questions in **Section 1: Renewal**.

	The **Required** icon indicates that the question you are on must be completed in order to submit the form.
	The **Attachment** icon indicates a question that you can upload an attachment.
	The **Add** icon indicates an element that you can add additional information.
	The **Add Image** icon indicates that you can attach an image to the corresponding section.

- If you submitted an amendment to this protocol for the previous year, this field will populate with the previous content. It is expected that you OVERWRITE the former content. (The content from the previous review is SAVED as another version of this protocol, so you will not be losing this content if deleted.)

a. **Protocol Status:** Confirm whether you wish to continue the study or permanently close it. Your selection will determine which follow-up questions will be displayed.
   i. ***If permanently closing:*** Confirm whether the animals on this protocol are alive and being housed. You should also describe any unanticipated problems or adverse events, morbidity or mortality, the cause(s) if known, and how these problems were resolved. Lastly, provide information on the progress made during the approval period.
   ii. ***If requesting renewal:*** Describe any unanticipated problems or adverse events, morbidity or mortality, the cause(s) if known, and how these problems were resolved. Explain any changes that were made in the last year and provide information on the progress made during the approval period.

Step 7: Update the remaining protocol sections as needed and click **Save**.

Step 8: You have completed the renewal application. Click the **Submit** button. The form will be checked for errors. – [If any required items have not been completed, you will not be able to save. A *Save Failed* box will appear showing your errors. Click **OK** and **Cancel**. Use the ✳ button in the Outline to address any problem areas.]

Step 9: Click **Set Status**. Then, in the *E-Signature Information* window, enter your **IdentiKey User Name** and **Password**. Click **Save**.

Step 10: In the *Animal Protocol Submitted for Approved* window, click **Send** to email your protocol to the IACUC office.

2. Elicit Pre-Review Feedback via PDF (Do Not Use "Presubmit")

You will have noticed the Presubmit button in the toolbar. Use this to provide **view-only access** to others for the life of your protocol. Please note, **they will NOT be able to provide comments within Topaz.** They can only view. **To elicit feedback, print a Protocol Detail Report (PDF) and email it to exchange comments offline.**

Create Protocol Detail Report (PDF)

Step 1: Go to the Topaz login page at https://animalprogram.colorado.edu.

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- User experience is *greatly influenced* by the browser in use.
- Bookmark this page for easy access later.
- Login with your CU IdentiKey and password.

Step 2: Under *Compliance* click on **Animal Protocols**.

Step 3: Hover (with your cursor) over *Protocols* and a menu will appear. Select **the appropriate type of protocol** – The screen will refresh and display the *according protocol* window with a list of your protocols that are eligible for an annual review.

Step 4: Select the desired protocol and click the **OK** button. – The window will close and a protocol window will appear.
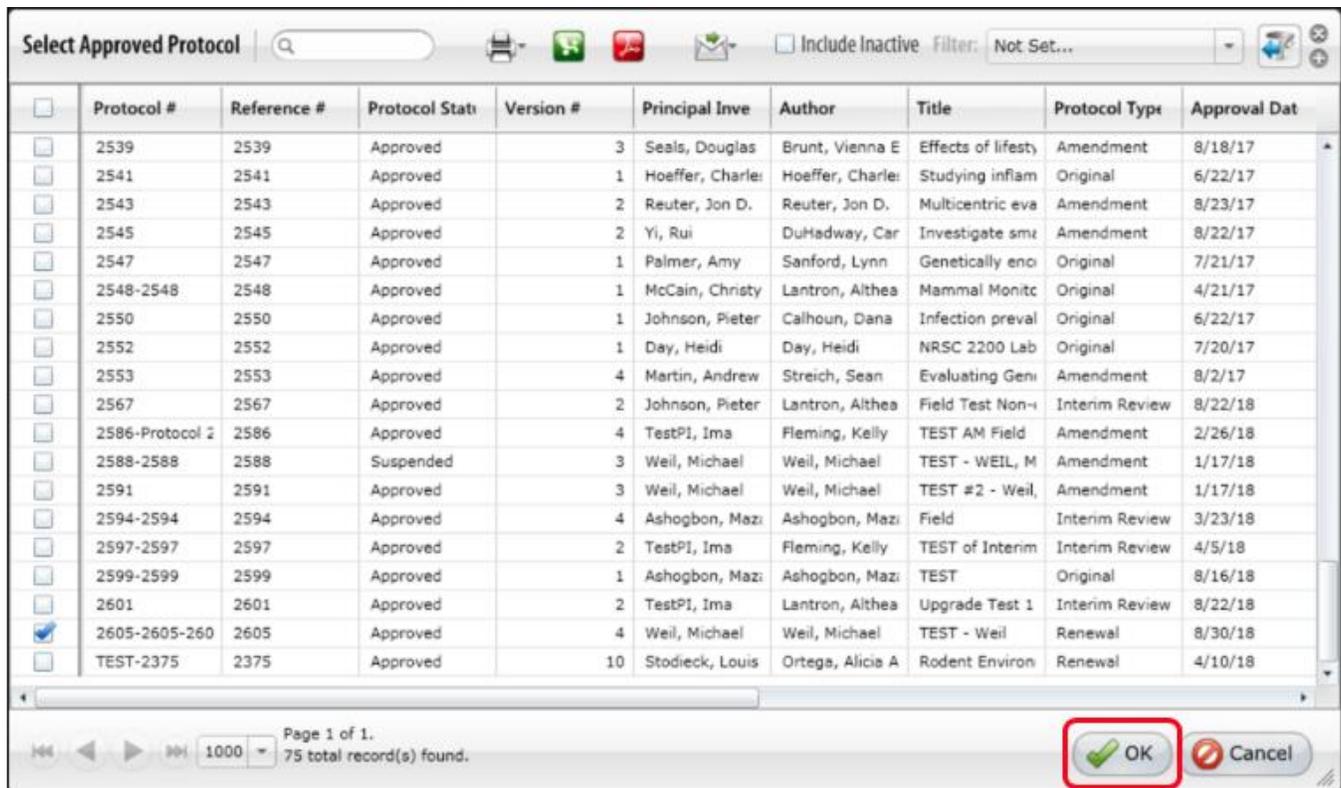
Step 5: Click on **Reports** and select **Protocol Detail Report**. DO NOT select *Presubmit*.
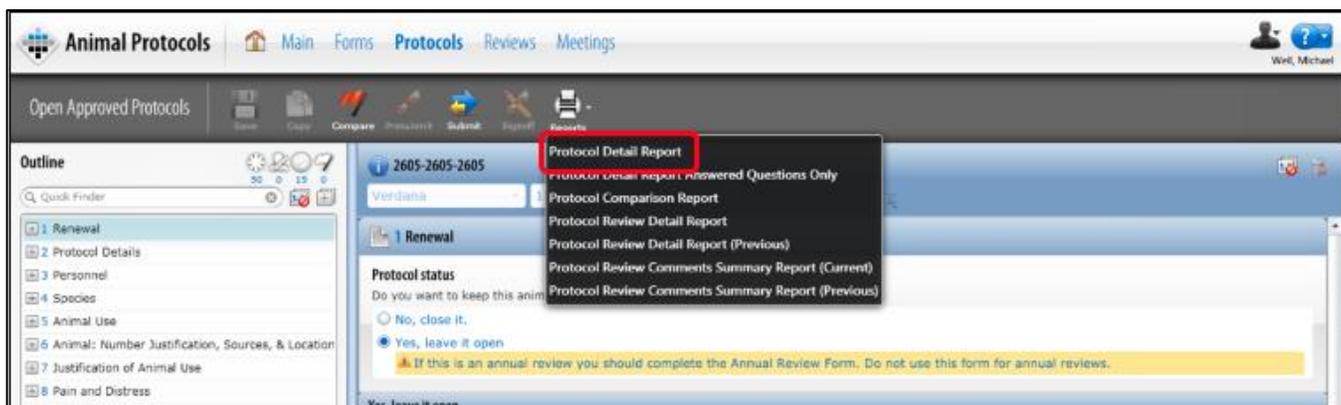
Step 6: Download the report to your local hard drive. (The file will be in a PDF format. We recommend using Adobe's comment tool.)

Remove Pre-Submission Reviewer (if added previously)

Step 1: Go to the Topaz login page at https://animalprogram.colorado.edu.

- o For your Internet browser it is recommended to use Safari, Internet Explorer, or Mozilla Firefox v52. – You will need to run or install Silverlight to access Topaz. (How to install Mozilla Firefox v52.)
- o User experience is *greatly influenced* by the browser in use.
- o Bookmark this page for easy access later.
- o Login with your CU IdentiKey and password.

Step 2: Under *Compliance* click on **Animal Protocols**.

Step 3: Hover (with your cursor) over *Protocols* and a menu will appear. Select **the appropriate type of protocol** – The screen will refresh and display the *according protocol* window with a list of your protocols that are eligible for an annual review.

Step 4: Select the desired protocol and click the **OK** button. – The window will close and a protocol window will appear.

Step 5: Click on **Presubmit**.
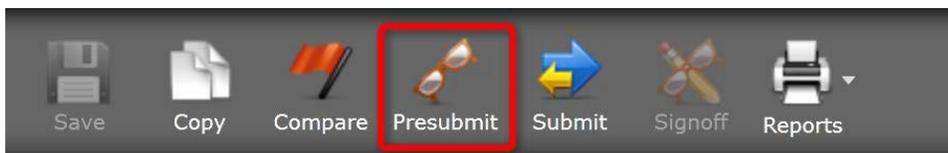
Step 6: Click on the **remove icon** ⊖.

3. Animal Orders

You can submit an animal order in Topaz for any approved protocol. Animal orders can be scheduled for a single delivery or a standing order. The following tutorials explain how to create an order and schedule delivery.

How To Order Animals

Step 1: Go to the Topaz login page at https://animalprogram.colorado.edu.

- o For your Internet browser it is recommended to use Safari, Internet Explorer, or Mozilla Firefox v52. – You will need to run or install Silverlight to access Topaz. (How to install Mozilla Firefox v52.)
- o User experience is *greatly influenced* by the browser in use.
- o Bookmark this page for easy access later.
- o Login with your CU IdentiKey and password.

Step 2: Under *Operations* click on **Animal Orders**. [You may need to navigate to the *Topaz Elements* page.]

Step 3: Hover (with your cursor) over *Orders* and a menu will appear. Select **Create New Order** – The screen will refresh and a *Select Form* window is displayed.

Step 4: Select either:
- **Animal Ordering Form** (the most commonly used form) if ordering from a commercial vendor.
- **Import Request Form** if acquiring animals from another source such as another University.

The menu will close and the screen will display the animal order screen with an Outline of the sections and corresponding questions.
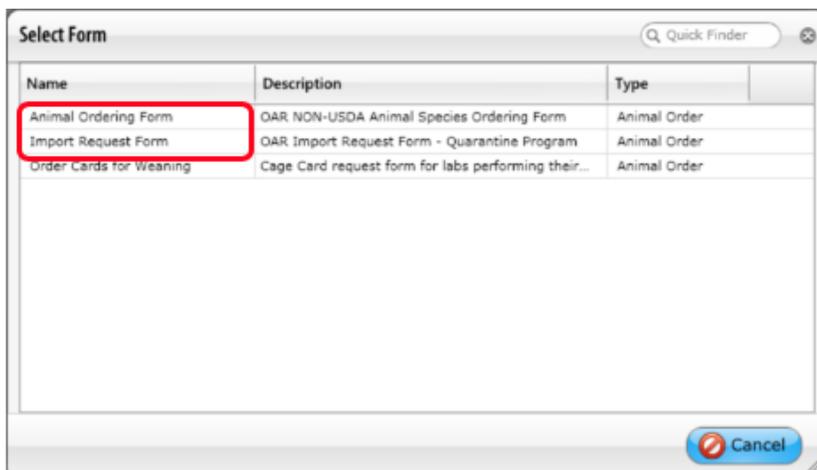
Step 5: Complete the questions in each section. Click on the **Next** button to advance to the next section.
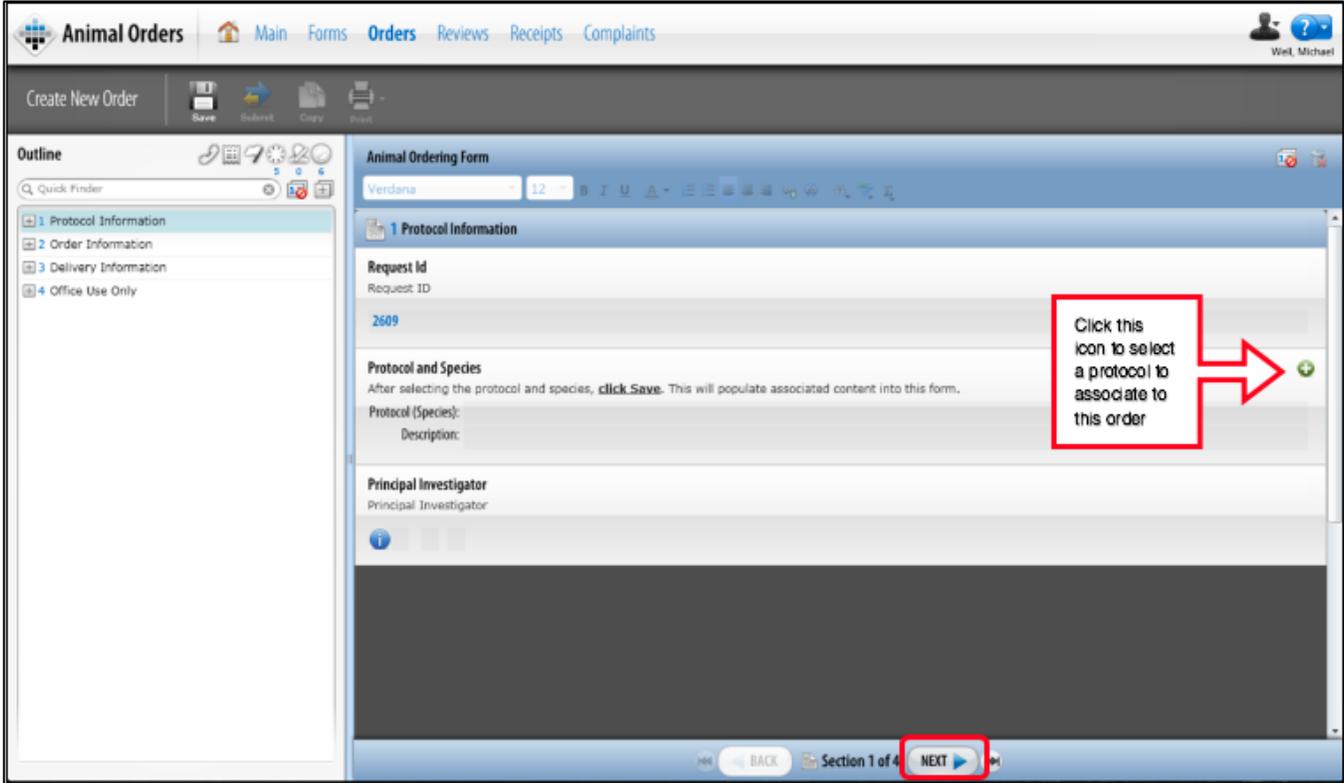
- **Section 1: Protocol Information** – Under Protocol and Species click the ⊕ icon to select a protocol. A new Select Protocol/Species window will open. Select the desired protocol from the list. The window will close. Click the **Save** icon. **You must select a protocol and save for the remainder of the form to populate**. Click the **Next** button.
- **Section 2: Order Information** – Under Vendor click the ⊕ icon. A Select Vendor window will open. Click on the appropriate vendor. The window will close. Click the Next button.
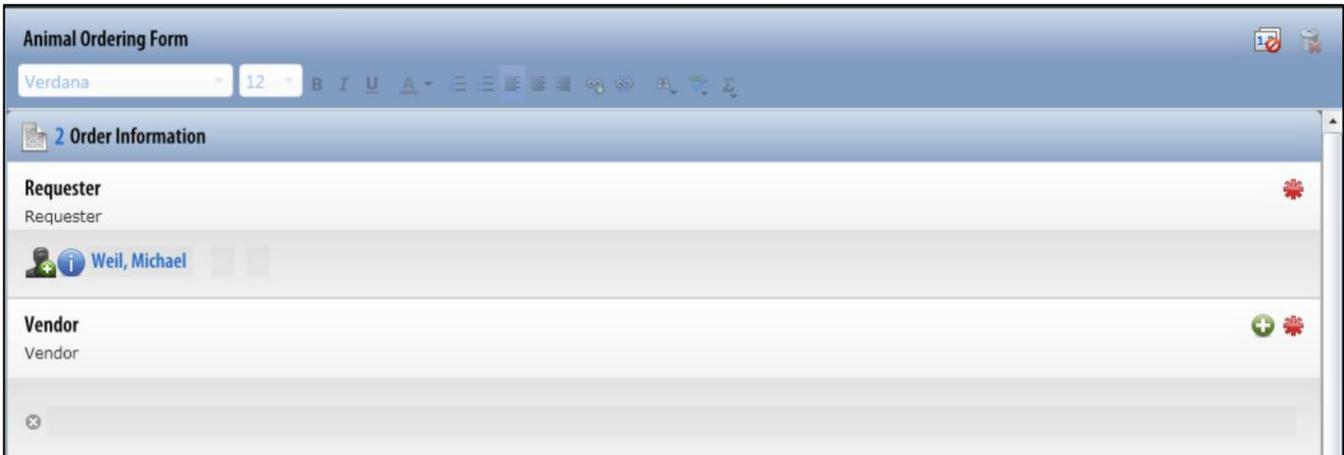
- **Section 3: Delivery Information** – In this section you will set the schedule for the animal delivery.

  a. In the top right corner of the Delivery Schedule section, click the **Schedule Deliveries** button.
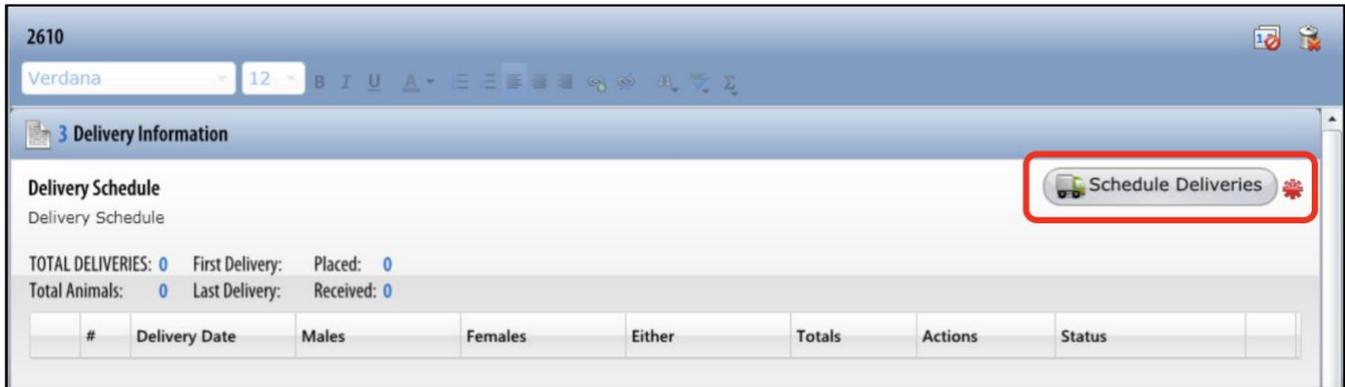
  b. A new Add Deliveries window will open. To select a date, click on the date in the calendar. Dates marked with an "x" are blackout dates upon which deliveries cannot be scheduled. You can schedule deliveries for a single date or multiple dates. For guidance for setting multiple dates, see Recurring Order. When you have made your date selection, click the **OK** button.
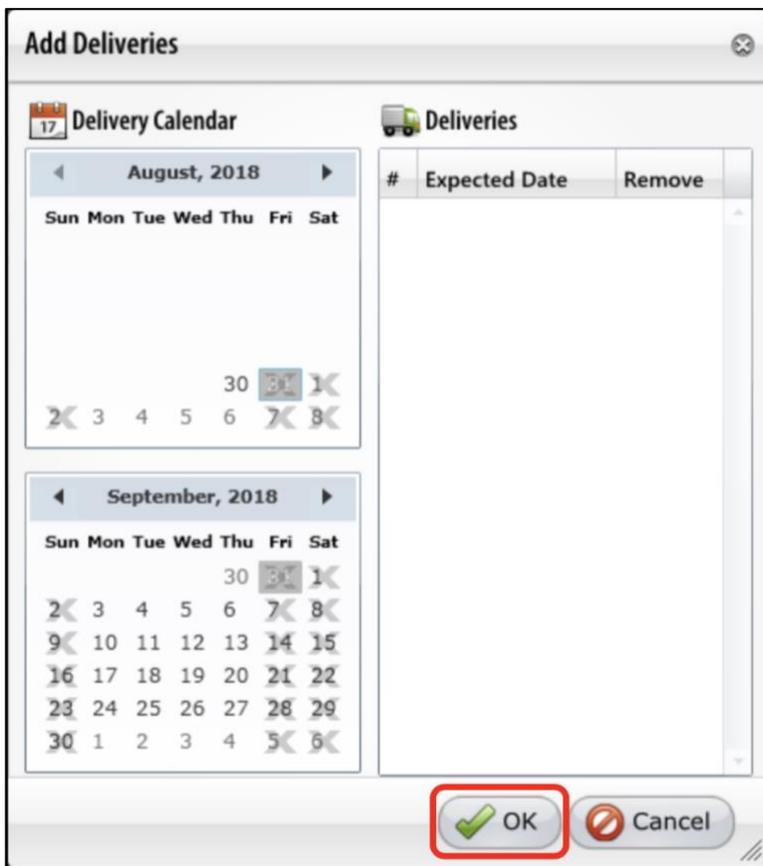
c. The window will close and the new delivery date will be added to the Delivery Schedule. – Click the ↱ icon (to the left of the Delivery Date) to edit the delivery details. The question section of the screen will refresh.

d. The question section of the screen will refresh. Complete the questions using the + icon to open drop down menus. *Please note, all questions marked with a red * are required questions.* After entering the Strain/Stock/Breed, click the **Save** icon to populate the number of animals available. Enter the amount of animals you want to order. When finished, click the **Show Sections** button. Click the **Save** icon.
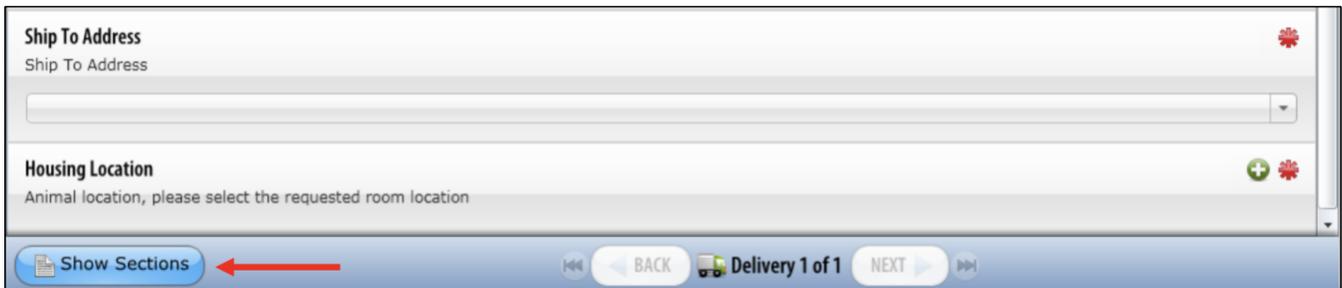
e. The Delivery Schedule will update to include the new delivery details. – The remaining section, Section 4: Office Use Only, will be completed by the OAR office. You do not need to enter any information into this section.

Step 6: You have completed the order. Click the **Submit** button. A Set Status window will open. Click the **Set Status** button. The form will be checked for errors. – [If any required items have not been completed, you will not be able to save. Use the ✳ button in the Outline to address any problem areas.]


Step 7: When all errors are resolved, the *Set Status* window will close and an *E-signature Information* window will appear. Enter your **CU IdentiKey User Name** and **Password**, then click the **Save** button.

Recurring Orders

Delivery for a standing order is started the same way you would [create a one-time delivery](#). The major difference begins when you are on the *Schedule Deliveries* window of *Section 3: Delivery Information*.

Step 1: In the top right corner of the Delivery Schedule section, click on the **Schedule Deliveries** button. – A new *Add Deliveries* window will open.
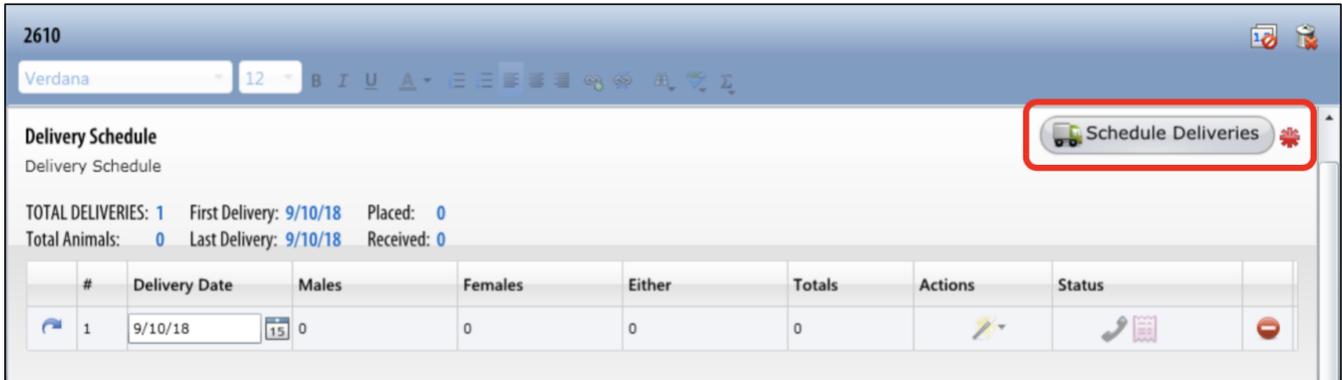
Step 2: Click on the dates in the calendar on which you would like delivery. Dates marked with an "X" are blackout dates upon which deliveries cannot be scheduled. When you have made your date selections, click the **OK** button. – The window will close and the date will be added to the Delivery Schedule.
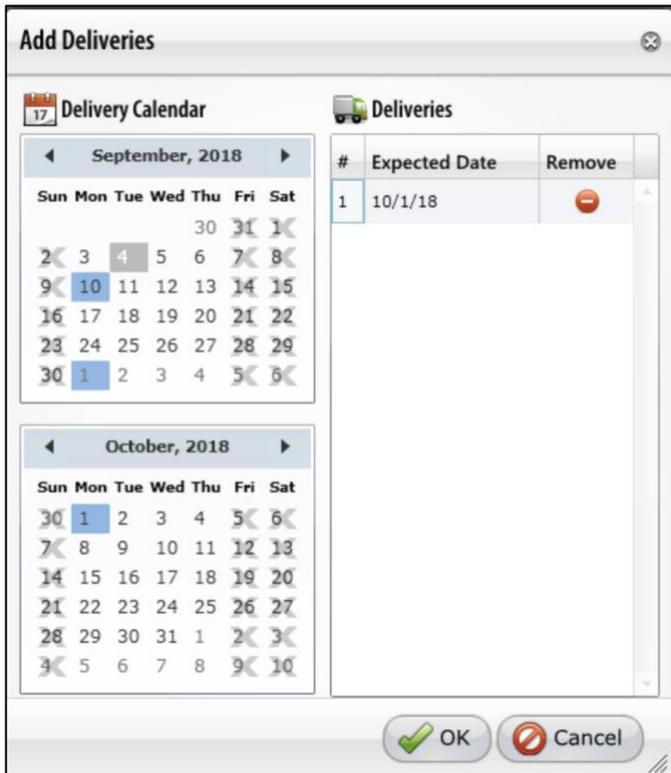
Step 3: Click the ⤾ icon to edit the first delivery details. The question section of the screen will refresh. Complete the questions and enter the amount of animals you want to order. When finished, click the **Show Sections** button. Click the **Save** icon.

Step 4: The Delivery Schedule will update to include the delivery you modified. If the delivery information is similar, you can easily copy first delivery details to the other deliveries using the *Actions* drop-down. Click the ✎ icon. A menu will appear, select the **Copy to ALL Other Deliveries** to copy the information to all entries, or the **Copy to Subsequent Deliveries** to copy the information to all following the current delivery. If each delivery is different, use the ⤾ to edit each delivery. Click the **Save** icon when finished.

Step 5: The remaining section, Section 4: Office Use Only, will be completed by the OAR office. You do not need to enter any information into this section.

Step 6: You have completed the order. Click the **Submit** button. A Set Status window will open. Click the **Set Status** button. The form will be checked for errors. If any required items have not been completed, you will not be able to save. Use the ✳ button in the Outline to address any problem areas.

Step 7: When all errors are resolved, the *Set Status* window will close and an *E-signature Information* window will appear. Enter your **CU IdentiKey User Name** and **Password**, then click the **Save** button.

Animal Order Outline Filters

Use the Outline filters to easily view certain features in the form. When turned on, the filter will appear in color. The number below each filter indicates the number of questions associated with that filter. In the example below there are three required questions. When turned on the filters will display its respective question type. You may apply multiple filters at the same time.

Placed Deliveries	This filter displays deliveries that have not been placed.
Received Deliveries	This filter displays deliveries that have been received.
Different Deliveries	This filter displays deliveries that are different from the others.
Required Questions	This filter displays all questions that as marked as required.
E-Signature Questions	This filter displays all questions that require an e-signature sign-off.
Unanswered Questions	This filter displays all questions that were not answered by the author, PI, or other individual who submitted the protocol for review.

4. Order New Cage Cards For Weanings

Inform OAR staff of expected litters and request new cage cards. By completing this form, you are also reporting animal usage that will be deducted from your protocol.

Step 1: Go to the Topaz login page at https://animalprogram.colorado.edu.

- o For your Internet browser it is recommended to use Safari, Internet Explorer, or Mozilla Firefox v52. – You will need to run or install Silverlight to access Topaz. (How to install Mozilla Firefox v52.)
- o User experience is *greatly influenced* by the browser in use.
- o Bookmark this page for easy access later.
- o Login with your CU IdentiKey and password.

Step 2: Under *Operations* click on **Animal Orders**. [You may need to navigate to the *Topaz Elements* page.]

Step 3: Hover (with your cursor) over *Orders* and a menu will appear. Select **Create New Order** – The screen will refresh and a *Select Form* window is displayed.

Step 4: Select **Order Cards for Weaning**. – The menu will close and the screen will display the animal order screen with an Outline of the sections and corresponding questions.

Complete Section 1: Wean Protocol Information

Step 1: Click the ⊕ button to open the *Protocol and Species* selection tool. Then select the associated protocol.

Step 2: Click **Save**.

Complete Section 2: Wean Information

Step 1: Click **Wean Information** to open the next section of the form.
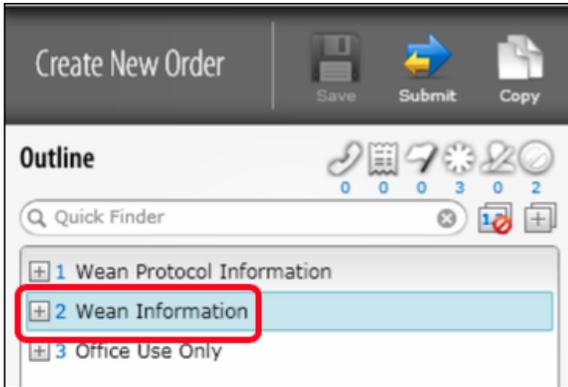
Step 2: Click **Scheduled Deliveries**.
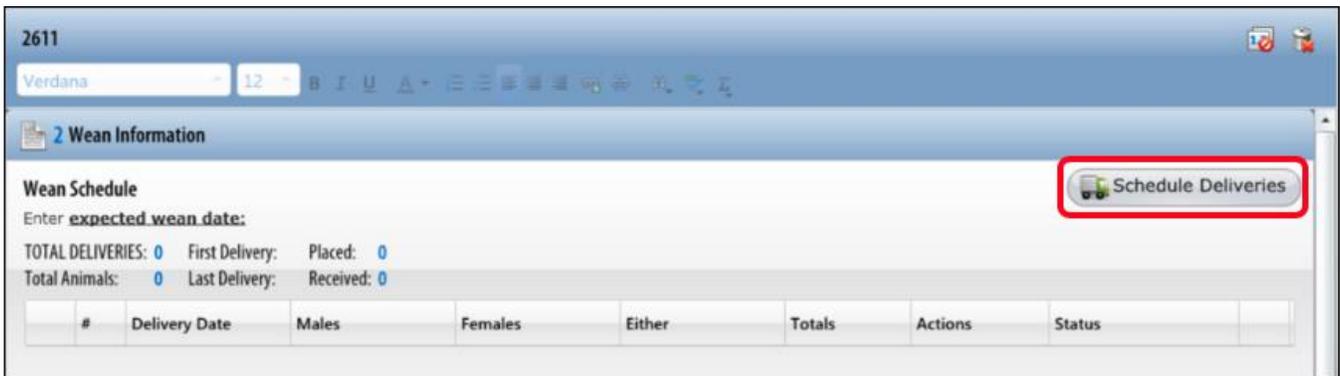
Step 3: Set the date the litter will be weaned and placed in new cages. [If multiple litters are associated with this protocol, multiple dates can be selected.] – Click **OK** when finished.
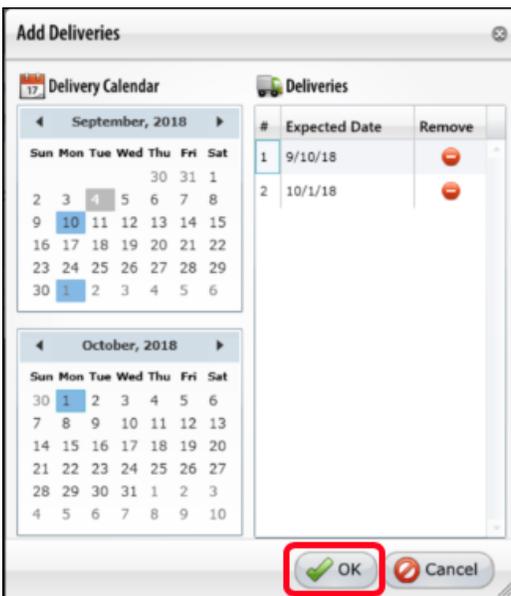
Step 4: Open the Delivery subform by clicking on the ↱ arrow next to each delivery date.

Step 5: Complete the **Delivery subform** and then click **Save**. (See the entire subform on the following page.)

Schedule Multiples Deliveries

Step 1: Navigate to **Wean Information** and schedule additional deliveries as needed.

Step 2: If you would like to copy details from the subform you just completed (e.g. contact info, per diem account), open the *Actions* dropdown and selecting **Copy to ALL** or **Subsequent Deliveries**.

Step 3: Open the subsequent delivery forms and **make changes specific to that weaning request** – animal numbers, strain, birthdate, etc.

Step 4: Click **Submit**.

Step 5: In the pop-up window, click **Set Status**.
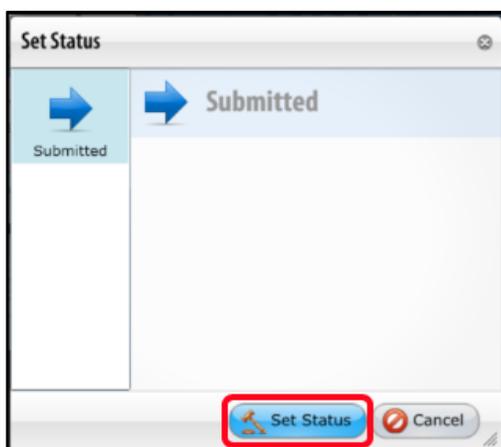
Step 6: When all errors are resolved, the *Set Status* window will close and an *E-signature Information* window will appear. Enter your **CU IdentiKey User Name** and **Password**, then click the **Save** button.

- Make note of the **Item Name** (aka the Request ID) for your records.