Animal Care Committee
Animal Care and Veterinary Service

Protocol Submission
What will change

• TOPAZ Champion
  – Primary user
  – Train and assign roles to users
  – Main contact all things TOPAZ with lab and ACVS

• Researcher’s Toolbox vs TOPAZ
  – Each user will have their own user name & password
  – TOPAZ will provide access to not only protocols but other information linked to the PI’s account.
  – Cage information and billing information will also be available to the PI and some key associates.
Starting and logging on to TOPAZ Elements

Enter your assigned username and password.

Select “Training” from the drop-down list.

Click on Login
The use of the back button \( \leftarrow \) and the close button \( \times \) may cause the loss of data or false log out of the system, press the F11 function key for a full screen view.
You should now have a full screen view.
All products associated to the user’s role appear here.
This is the default home page.
Navigation Methods

Basic Navigation

• Users may navigate from the default home page by selecting a product.

Product Selector

• Users may move from product to product by clicking the product selector button, located at the top left of any page.

• This displays a list of products. Clicking a product takes the user to the main product page.
Human Silhouette

- Located on the top right allows the user to change their password and set a preferred home page.
- It is also the button users **must always** select to Logout.
- The application’s database is displayed in grey.

- The help button is located beside the Human Silhouette
**My Dashboard** is a customizable navigation feature that displays a list of user-selected options in one location.

**Selecting My Dashboard**
Users may select My Dashboard from:

- Product Selector on the top left of any page
- Main Navigation Page under Places

**Customizing My Dashboard**
Dashboard system-determined options are based on user roles which can be easily added, removed or reordered from the left hand column to suit the users preference.

Users may want to set My Dashboard as their home page.
Record Selector Grids

- Topaz has many record selector grids which can be exported to an Excel or a PDF document.
- These grids can be customized and filters may be set to suit the user.
- Columns can be moved, expanded, sorted, removed and grouped.

Items can be grouped or ungrouped:

Click on the title row of the selected column.
Select the blue arrow to open a selection of filter options.
Select Group By This Column or Ungroup.
Filters

• Some selector grids may have a large number of records. Quick finding and sorting are set to a finite number of records (1000 or less).

• **Quick Finder** – type any numerical or alphabetical character to locate a record.

• **Filter Dialogue Panel** – features control buttons to filter records.
• Users who routinely access more than one product may want to keep the default home page.
• Users can also set their own personal home page from any product or page, such as My Dashboard, by clicking on the Human Silhouette button located on the top right of the screen.
• A drop-down menu displays where users can select “Set as Home Page”
Review Process

1. PI submits protocol for review.
2. ACC Coordinator reviews the protocol for completeness and creates the review assignment.
3. Animal Care Committee Chair assigns the lead reviewer.
4. Reviewers, including veterinarians, provide their comments directly on the protocol submission in the application.
5. Once the review is complete, the lead reviewer advises the ACC Coordinator.
6. The ACC Coordinator summarizes all comments and closes the review.
7. The ACC/PRG committee renders a decision: Approve, Return for Modification or Deny.
8. The lead reviewer presents the protocol to the Animal Care Committee/Protocol Review Group.
Review Assignment Roles

- **DVM** – veterinarian reviewer who can comment and enter closing remarks.
- **ACC member** – reviewer who can comment and enter closing remarks.
- **Lead Reviewer** – reviewer who can comment and enter closing remarks. Notifies the ACC Coordinator when the review is complete. Presents the protocol at the ACC/PRG meetings.
Accessing Protocols

• All those named on a protocol will be able to view the protocol.
• You can access the protocols from the Product Selector on the top left or the Main Page.
My Dashboard

- My Dashboard/My Protocols
- Select Protocol
Animal Protocols

- Animal Protocols
- Protocols
Creating an Original Protocol

• Select Create Original Protocol
  – A forms selector grid appears
Experimental Protocol Form

• Select the experimental protocol form
  – most elaborate form for submission
  – most generally used

• Breeding and Field Study forms are very similar in functionality.
The Experimental Form opens.
You can navigate the form by using the
or filter the questions using the icons located on the top left to filter questions.
These are “and” type filters which will narrow down your selections as you click on the
icons.

- Required Questions
- E-signatures
- Unanswereded Questions
- Questions with Changed Answers
- Show/Hide Outline Numbers
- Expand/Collapse All Items

Provides information on the protocol, such as protocol dates, reviews, e-signatures and emails
The Form Screen

The Outline Section

• Sections and subsections

• Questions may be nested with yes/no conditions, drop-down lists, tables or text.

• Text questions are usually Rich Text, which allows the user to edit, copy/paste, insert hyperlinks or attach documents.

• Navigate the form using this outline by clicking on a section or subsection.

• Each question is required.

• e-signature from the PI is required for submission to the ACC
The Form Section

- Only one section of the form is displayed.
- Questions are answered in this section.
- Navigate the specific section of the form using the side scroll bar or by question.
- Each question is required.
- e-signature from the PI is required for submission to the ACC.

You may navigate to a new section by using the section buttons at the bottom of the screen using the Back or Next buttons.
The Green Orb Button

• The Green Orb Button will appear whenever you are required to make a selection from a system list or create a table.

• Many questions will require that you make a selection from these system lists, such as personnel and species.

• To access these lists, you will be required to click on the Green Orb Button usually found on the top right corner of the question.
Overview Section

• If you are not the Principle Investigator, the Principle Investigator question must be the first question answered.

• Click on the human silhouette with the green orb.

• Select the PI and click , located at the top of the protocol form.

• A system generated reference number will be assigned to the draft protocol.

• You are ready to answer all the questions in the form.
Protocol Associate Roles

• **Principle Investigator** – has access to the entire protocol, create, edit and submit.

• **Author** – can access and edit a protocol in its unsubmitted state. These persons can also initiate an amendment or renewal.

• **Creator** – creates the protocol, generated by the system and may be different than the Author.

• **Co-Investigator** - able to alter this protocol on your behalf.

• **Key Associate** - a key person who should receive an email notification when protocol status changes.

• **Authorized to Order Animals** - person granted permission to place animal requests.
Protocol Associate List

• Select the personnel who must be named on the protocol by clicking the green orb button.
• The Protocol Associates selector grid appears.
• Select all that apply using the Quick Finder.
• If the person does not appear on this list, click cancel.
• You will add the person by completing the table in the Add Person to the Master List section.
• You will also need to notify the ACVS Systems Administrator. Fill out and send the attached form as instructed.
Species Section

- The functionality of the Species Section works differently than other questions.
- Select the Species section from the Outline or the Section task bar on the bottom of the form screen.
- When the Species Section appears, make your species selection by clicking on the green orb button,

\[+\]

- The species grid appears
- Select all species that apply by clicking the green orb and click OK
- Remove a selection by clicking on the red orb button,
Select Show Segments, located at the bottom left, to open the Species questions.

Select Show Sections to close this section.
Species Questions

• The species/strains questions must be answered as instructed to facilitate the Animal Order process.
• If you are adding several strains to a protocol, you must add one strain per animal line
• Mouse 1 = strain 1, Mouse 2 = strain 2, etc., this is required by the CCAC.
• You can create additional lines by clicking on the green orb button on the “Species 1” question. This will open additional lines and must be done for all strains you choose to list on the protocol.
• One strain per mouse line will be selected from a system shared listed, click on the green orb button.

• The Strain/Stock/Breed grid appears.
Selecting from the Strain/Stock/Breed Grid

- Each grid has a selection of strains.
- The mouse grid is very large > 1800.

When searching the mouse grid, note the following:

1. The default setting to view the list is 100 per page.
2. You can only search the page displayed on screen.
3. The list is in alpha/numeric order.
4. Before starting a search, change the view setting to 1000, located on the bottom of the page. Go to the page where you will most likely find your strain.
5. You can navigate back and forth by using the forward and back buttons.
Species Description Question

Adding strains to the list

- If the strain you want to add to your protocol is not displayed on the Strain/Stock/Breed grid, select OTHER.
- You can enter the new strain in the Species Description question.

Why restate the strain

- This is very important.
- You must manually restate the strain in this section to properly identify your strains in other grids throughout the application.
- Otherwise, only Mouse 1, Mouse 2 etc will appear on the grids.
Authorized Amounts

• You must fill in two questions on animal numbers.

• Under Authorized Amounts, you must select the highest category of invasiveness from a system list.

• A details and amounts table must be provided.
Completing the form for submission

Things to remember:

• Read the question carefully

• Click ![Save](image) before navigating to another section

• Do not back out of the system

• Only the PI can submit the protocol. The ACC coordinator will return a protocol if it does not have the PI’s e-signature.
Submitting the form

• The PI can open the unsubmitted protocol from My Dashboard or the Product Selector/Protocols.

• All questions requiring an e-signature must be answered. These can be located by clicking on the e-signature icon in the Outline section.

• Save the protocol and submit using the submit icon.

• A system generated e-mail will be sent to confirm your submission.
Amendment/Renewal

From the Product Selector / Protocol

• Select
  – Create Amendment Protocol
  – Create Renewal Protocol

• Select the protocol to amend or renew.
• Select the corresponding form.
• Provide the specifics about your Amendment or Renewal.
• Update the form in the corresponding sections; i.e., animal numbers amendment, the Species Section must be updated.
Copy Feature

- You can copy a protocol to another form.
- Useful when you protocol has terminated.
- Will not be required to re-enter information, if the protocol has reached end of life when the research project is still viable.

To do so:
- Select “Create Original Protocol”
- Select the PI in the form and Save
- Select the Copy icon, a warning message appears, select OK
- Select the protocol to copy, from the Protocol selector grid.
Compare Feature

• The Compare icon, located on the top section of the form, allows the author to compare changed answers.

• Useful when you want an amendment to the original protocol or if a protocol is returned for resubmission from the ACC.

• Click on the Compare icon, select the protocol to compare.

• Changed answers will appear in red in the Outline Section.
1 Overview

Reference Number
This is a system generated number.

1300

Principal Investigator
The principal investigator must be selected from a system defined list. If you are not the investigator, please choose the appropriate person.

Harrison, Inv e iharrison@to 512-554-789

Author

Previous Submission

Reference Number
This is a system generated number.

1300

Principal Investigator
The principal investigator must be selected from a system defined list. If you are not the investigator, please choose the appropriate person.

Harrison, Inv e iharrison@to 512-554-789

Author
Reports

• Select the printer icon to generate PDF reports.

  – Protocol Detail Report Answered Questions Only: prints only answered questions.
  – Protocol Comparison Report: prints the two protocols side by side but only the changed questions.
  – Protocol Review Detail Report: provides the detailed review
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