

# TOPAZ Enterprise - Quick Reference Sheet

Link: <http://granite.urmc-sh.rochester.edu/TOPAZEnterprise>

UCAR Website: [www.urmc.rochester.edu/ucar](http://www.urmc.rochester.edu/ucar)

## General:

1. Save your protocol often using the save button. There is no autosave feature.
2. Do not leave the website or you will lose everything that is not saved.
3. TOPAZ will time out if not used for 10-20 minutes. Make sure you save before you leave it, or log out to make sure your information is saved.
4. You must use keyboard commands for copying and pasting: CTRL-A = select, CTRL-X = cut, CTRL-C = copy, CTRL-V = paste.
- 5.

## Creating an Original Protocol

1. From the Start Page or the top menu, click on Animals > Protocols.
2. Select **Create Original Protocol** from the options.
3. In the Select Form screen, choose the appropriate Form.
4. A blank form with pre-assigned reference number and PI is constructed.
5. Enter required information for each section of the protocol request.
6. You can navigate through the protocol using the Outline on the left.
7. Look for the *View Help* icon (blue circle with question mark) in select questions. When you click on this icon, a box will appear providing helpful information while you complete your form. Some questions also have a link to extended help files on the UCAR web site.
8. Selected questions may include a table. In order to add a row to the table, click on the *Add Row* icon (green plus sign) in the upper left hand corner of the question. You can add as many rows as necessary. If you need to delete a row, click on the *Remove Row* icon (red X) at the beginning of that row.
9. When you get to the species section, click on the green + sign to get a list of species allowed on the form you have chosen. Click on the + to add the species questions to the form.
10. Throughout the request, there may be conditional questions which appear when you choose various options in multi-choice lists. Please make sure you answer these questions.
11. Click the *Save* icon (diskette). Make sure to save often. In the Outline, you may see an *E-signature* filter icon (pencil over a person) by a question, indicating the need to sign an E-Signature. Once this question has been populated and saved, the signature box will appear. Respond with User Name and Password. Certain e-signature questions need to be completed by the Principal Investigator.
12. To submit the request, click on the Submit icon (Blue arrow). A notification will pop up stating that the protocol has been submitted. NOTE: All required questions, indicated with red asterisks, must be answered before submitting the request. If all required questions are not answered, a message will appear stating which questions need to be addressed before submitting.
13. Once you have answered the required questions, you will need to click on the Submit Protocol icon again. The *E-signature* box will appear again. This is required in order to submit the protocol for review. Respond with User Name and Password.

## Protocols Returned for Modification (Answer UCAR Questions)

1. You can open returned protocols either from the Dashboard (choose the protocol with the status "Returned for Modification" from the My Protocols list) or from the Animal Protocols menu (choose Open Returned Protocols).
2. You can quickly find the items needing attention by clicking on the *Questions with Summary Comments* filter icon (hover over the icons to see titles) in the Protocol Outline. When the filter is clicked, the Protocol Outline will display those sections containing questions with summary comments. Expand the Protocol Outline sections (click on the +) and click to select a question.

3. Each question needing attention will have a summary comment at the end of the question. Make sure to edit your response to address the comment or question. Click **Save**. You do not need to save after each question, but it is a good idea to save often.
4. To resubmit the protocol request, click on the *Submit Protocol* icon (Blue Arrow). You will receive a pop-up notification stating that your protocol request has been submitted.

### **Amending a Protocol (Modification Request)**

**REMEMBER - "Create Amendment Protocol" (Submit a Modification) OPTION CAN NOT BE USED UNTIL THE PROTOCOL HAS FIRST BEEN SUBMITTED AND APPROVED ON LINE IN TOPAZ.**

1. From the Start Page or top menu, choose Animals>Protocols
2. Click **Create Amendment Protocol**
3. Select the protocol to be amended from the table.
4. Choose appropriate Amendment form.
5. Edit the fields to modify the protocol as needed – include your intention and justification in the Amendment section. Remember to refer to all the items in other sections that are being modified.
6. Click **Save**.
7. To submit the request, click the *Submit Protocol* icon. You will receive a pop-up notification stating that your protocol request has been submitted.

### **Renewing a Protocol (36 Month Review)**

**REMEMBER IF THE PROTOCOL YOU ARE RENEWING (Submitting 36 Month Review) IS NOT ALREADY ON LINE, YOU MUST FOLLOW THE INSTRUCTIONS FOR CREATING AN ORIGINAL REQUEST ABOVE.**

**NOTE: RENEW A PROTOCOL OPTION IS NOT AVAILABE FOR 36 MONTH REVIEWS, UNTIL EACH PROTOCOL HAS BEEN SUBMITTED AND APPROVED ON THE ON-LINE VERSION OF THE ANIMAL CARE AND USE FORM IN TOPAZ.**

1. From the Start Page or top menu, choose Animals>Protocols
2. Select **Create Renewal Protocol**.
3. Select the protocol to be renewed from the list.
4. Choose appropriate Renewal form.
5. Your currently active protocol form will be cloned and presented for changes. The animals numbers will be reset to zero.
6. Review each field and make any necessary changes to reflect the work to be done in the next 3 years.
7. Click **Save**.
8. To submit the request, click the *Submit Protocol* icon. You will receive a pop-up notification stating that your protocol request has been submitted.

### **Creating an Interim Review (APR)**

1. From My Dashboard, click on the My Dashboard link in the upper left-hand corner and choose Protocols for Animal.
2. Click the *Amend and Renew Protocols*.
3. Select **Create an Interim Review**.
4. Select the protocol to be reviewed.
5. Choose appropriate Interim Review form.
6. Complete the Interim Review. Remember to refer to items in other sections if amending/modifying any fields.
7. Click **Save**.
8. To submit the request, click on the *Submit Protocol* icon. You will receive a pop-up notification stating that your protocol request has been submitted.

## Modification to Add a New Grant to an Approved Protocol

You may now add a new grant to your protocol rather than submit an entirely new protocol for the grant, as long as the animal work in the new grant is reasonably similar to that in the protocol.

To add a grant to a protocol, modify the protocol fields (**using red text to indicate changes only if it is a paper protocol**) as follows:

### ***Project Title:***

Provide a **single** title. You may change the title of the protocol to reflect new work. The protocol title does not have to be the title of any of the grants. Do not list both grant titles in this field.

### ***Funding Source:***

For each grant covered by the protocol, list the

- agency,
- grant number,
- grant title, and
- PI.

### ***Abstract of Project:***

For each grant covered by the protocol, provide the

- grant title and
- scientific abstract

### ***Lay Summary of Project:***

You do not need a separate lay summary for each grant. Update your lay summary to reflect any new work added and any change in the animal models you will be using. Keep the language simple, and the length from 100 to 200 words.

### ***Grant Copy:***

Submit the following sections of the grant being added to UCAR (PDF or Word documents are preferred) for comparison with the protocol:

- abstract,
- specific aims,
- experimental design/research plan, and
- vertebrate animal section

All the animal work described in the grant must be in the protocol before we can provide an approval letter.

If all animal work described in the grant is already described in the protocol, the above information is all that is needed by UCAR.

***Make sure all animal work described in the grant is in the protocol, including species, strains and number of animals, and procedures done to animals, including all substances administered, and all manipulations. UCAR cannot provide an approval letter if all the animal work in the grant is not described in the protocol.***

Instruction for modifying the protocol to add species or strains, increase the number of animals, add or modify procedures, etc. can be found on the UCAR website:

<http://www.urmc.rochester.edu/ucar/documents/ModificationtoAmendProtocol.doc>

## Using Protocols

Recommended computer configurations:

Client PC	
Operating System	Windows XP SP2 / Vista / MAC OS-X 10.4 or higher
Computer and Processor	Minimum Pentium 4 (PC), Intel (Mac).
Browser	Internet Explorer 6/7 (8), Firefox 2.x,3.x Safari 2.x, 3x, 4.x
Memory	1 GB RAM or higher.
Hard drive	15 GB available disk space
Software	Microsoft Silverlight Player 3.0 or higher (download from <a href="http://www.microsoft.com/getsilverlight/Get-Started/Install/Default.aspx">http://www.microsoft.com/getsilverlight/Get-Started/Install/Default.aspx</a>
Software	Adobe Reader 5.x or higher (download from <a href="http://get.adobe.com/reader/">http://get.adobe.com/reader/</a>

You must be behind the University firewall to access TOPAZ. You can access P&R from the University network if your computer has a wired connection, or via the secure wireless access (UR\_MCwireless). You cannot access it using Guest Wireless. To use TOPAZ from home, or outside the URM domain, you must set up VPN on your computer. If you are outside the domain, go to <https://intranet-secure.urmc.rochester.edu/InfoSystems/HelpResources/Network/VPN/#install>

(from inside use

<https://intranet.urmc-sh.rochester.edu/InfoSystems/HelpResources/Network/VPN/#install>)

for instructions. If you are doing this from home, you will have to log in using your UoR Network name (NOT NetID) and password.

Follow the instructions for your computer type. Once VPN is set up, you should be able to connect to the UoR network, then launch TOPAZ. You may have to use the complete url (<http://granite.urmc-sh.rochester.edu/TOPAZEnterprise>) rather than the shortened version.

Recommendations from S. Stevens:

I use the Cisco client on my PC at home rather than Windows PPTP. It works just fine. I have no experience with Windows PPTP, so I can't make any recommendations about it.

For Macintosh users, Macs built-in VPN will connect you to the network, but for some reason does not allow you to connect to the server on which TOPAZ is running. This is true for OS 10.5.8 and OS 10.6.x. Instead, download the recommended Cisco client and the associated profile recommended for your OS version

I successfully use the client recommended for OS 10.4 (Cisco VPN Client for Macintosh v.4.9.01.0080) on both PPC and Intel Macs. I have also used it on Intel Macs running 10.4.x, 10.5.x and 10.6 without any problems, although upgrading from 10.5 to 10.6 required re-installation of the Cisco client before it would launch properly. Once the client was reinstalled, it worked without problems.

Connect to the VPN server using your network name and password, then launch your browser. Safari 3, 4 and FireFox 2.x, 3.x work on the Mac, IE7, E 8, and FireFox 2.x, 3.x work on PC).