

# TOPAZ Enterprise - Quick Reference Sheet

(Revised 8/31/22)

Link: <http://elementsweb-n.urmc-sh.rochester.edu/Elements/>

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 auto save feature.
2. Do not leave the website or you will lose everything that is not saved.
3. TOPAZ system 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.

## Creating an Original Protocol

Use this option for submitting a NEW 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 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)

**Use this option when submitting a modification for a TOPAZ protocol**

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 Rationale and Description in the Amendment section. (If there is type from a previous mod in these boxes, delete it. Only the current mod’s info should be in these boxes.) 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.

## Creating an Breeding Tracking Form (Interim Review)

1. From the Start Page or top menu, choose Animals>Protocols
2. Select **Create an Interim Review**.
3. Select the protocol to be reviewed.
4. Click on “Mouse and Rat Breeding Tracking Form” (only option)
5. Complete section #3 “Annual Protocol Review.” Only answer the 3 questions in that section.
6. Click **Save**.
7. 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 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>