



Drexel University DragonSPOT Animal Ordering User Manual

Office of Research and Innovation
Spring 2021

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Introduction

The DragonSPOT Animal Facilities module is a streamlined way to order, organize, and monitor lab animals connected to IACUC protocols. Once a protocol has been approved by the IACUC team in DragonSPOT, investigators can access the Animal Facilities module to order their species, monitor requests, and view inventory and charges. The ULAR team will be able to review and process orders, as well as handle billing within the system.

If any ULAR-specific questions arise throughout your protocol submission process, please reach out to ular@drexel.edu. For technical questions, please contact DragonSPOT-help@drexel.edu.

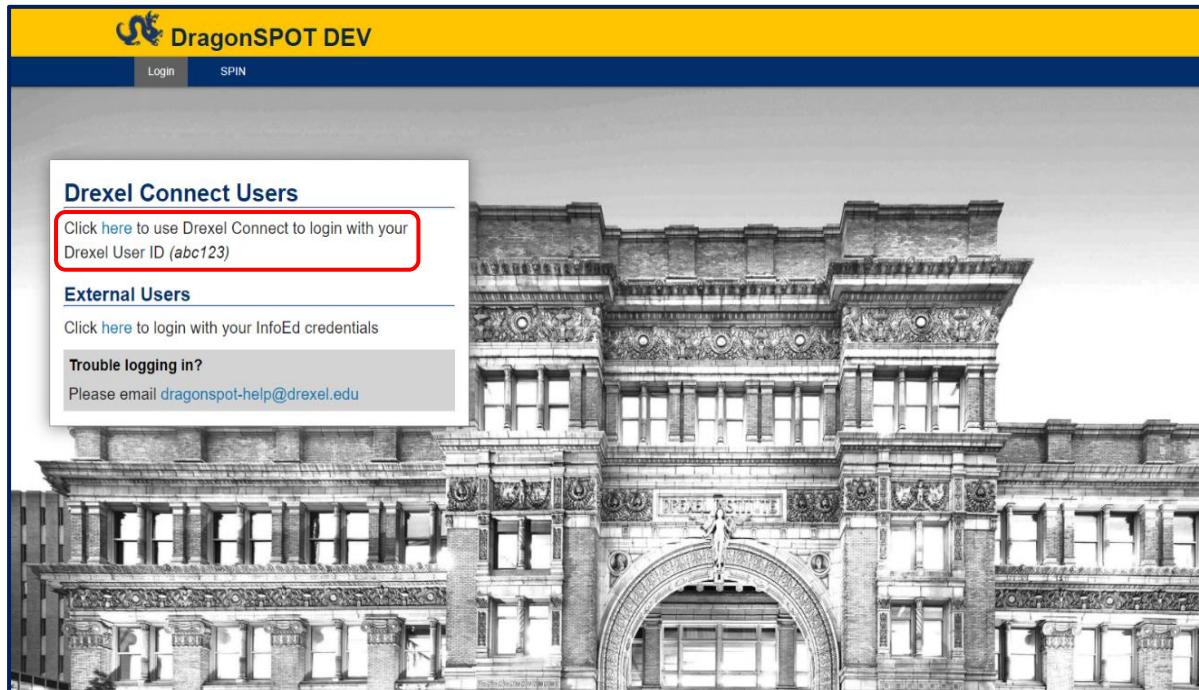
Request Workflow Process

The workflow process is as follows below. The status will be updated under the **Requisition Status** connected to your request:

- The investigator or lab assistant will create and submit an order within the DragonSPOT Animal Facilities module. The status of the request will be **ULAR Approval**.
- Once an order is submitted, the ULAR staff is able to review it. They will contact you within DragonSPOT should any changes need to be made. If modifications are required, the status will change to **ULAR Modifications**.
 - If the ULAR team needs to consult with the veterinarian, the status will change to **Veterinarian Review**.
- After any adjustments are submitted, the ULAR team will send the order to the vendor. The status of the record will change to **Vendor Communication** at this time.
- The ULAR staff will next update the order's status to **Ordered** upon confirmation receipt from the vendor.
- The status will ultimately be updated to **Delivered**, once the order has been received.

Accessing Drexel's DragonSPOT portal

- Log into Drexel's DragonSPOT at <https://dragonspot.drexel.edu/>. Click the link under **Drexel Connect Users**: "Click here to use Drexel Connect to login with your Drexel User ID (abc123)."
 - ✓ *Note: You can access DragonSPOT on any of these browsers – Safari, Firefox, Chrome, or Microsoft Edge.*

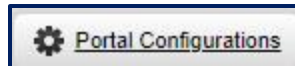


- You will then be taken to the Drexel Connect page where you can log in with your Drexel user ID (abc123) and password.

A screenshot of the Drexel Connect login page. The page has a blue header with the text "DREXEL CONNECT". Below the header is a white box with the following text: "Enter your user ID and password.", "USER ID (WITHOUT @DREXEL.EDU)", "PASSWORD", "CONNECT", and "HELP & SETTINGS". There are two input fields for "USER ID" and "PASSWORD", each with a small icon to its right. A yellow "CONNECT" button is located below the input fields.

Navigating the DragonSPOT Homepage

- Once you are logged in, you will see your personalized DragonSPOT homepage.
 - ✓ *Note: Your homepage is customizable and you can add widgets that are most helpful to you. To configure your homepage, press the **Portal Configurations** button in the top right corner.*

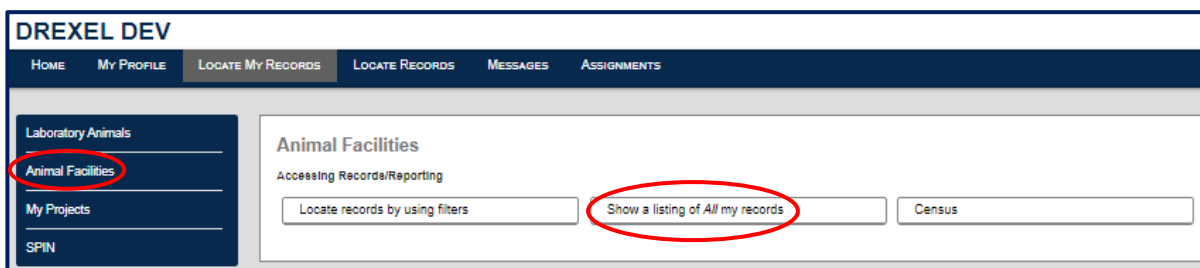


Once you configure your homepage your settings will be saved for the future. Please see the [Portal Configuration Quick Guide](#) for more information on portal features and navigating the homepage.

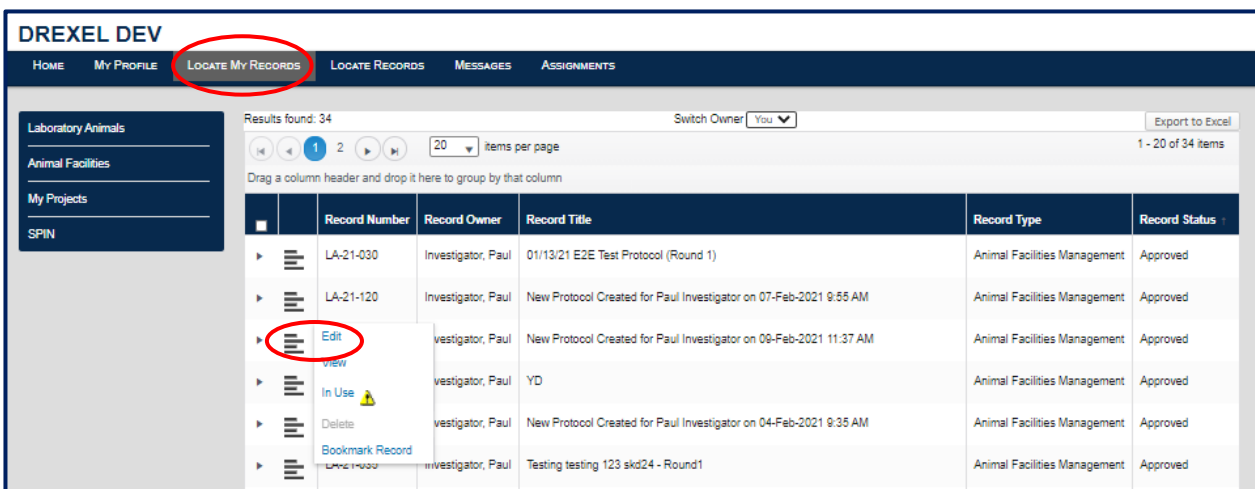
Creating and Submitting Your Animal Order

Starting an order

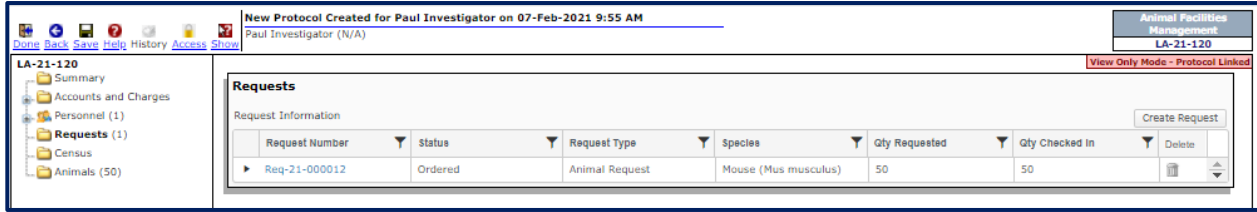
- Log into DragonSPOT as described above. Locate the protocol for which you would like to order animals.
 - You can do this by clicking on the **Animal Facilities** module on the DragonSPOT homepage and then click on **Show a listing of All my records**.



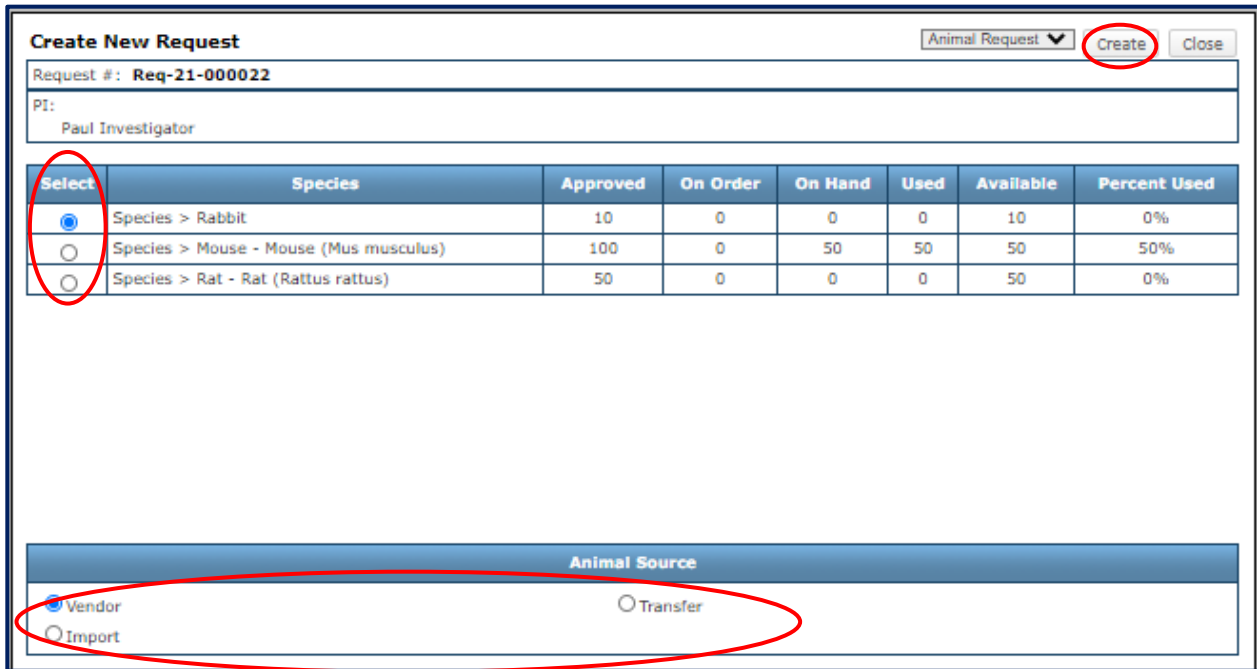
- Click the bars to the left of the record number and then click **Edit** in the options that appear.



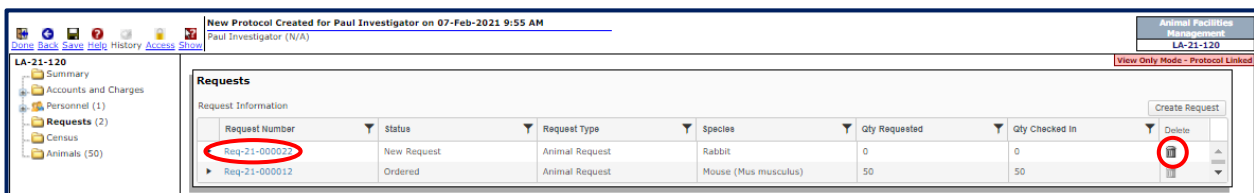
- A new window will appear. Click on the **Requests** button in the left-hand menu of the screen.
 - For definitions on each menu item, please see the [Navigating the Lefthand Animal Ordering Menu](#) section below.
- Click the **Create Request** button in the top right corner of the window.



- A new window will appear. If you have more than one species listed in your protocol, you will be prompted to select which species you are ordering.
- Select the **Animal Source: Vendor** (if you are ordering from a vendor), **Transfer** (if it is coming from an internal source), or **Import** (if you are bringing in from another university).
- Once you have made your selections, click the **Create** button in the top right corner of the window.



- Now you will see your request appear at the top of the **Requests** list.
 - ✓ *Note: The status will be **New Request**. See the [Request Workflow Process](#) section above for a list of workflow status definitions.*
- Click on the **Request Number** to begin working on your request.
 - ✓ *Note: The trashcan icon is where you can delete an unprocessed request.*



- A new window will appear and you can begin filling out the form, most of which will be prepopulated for you.

Saving the Form

- ✓ *Note: If you need to exit the form before you have time to submit it, please be sure the click the **Save** button in the top left corner of the form so you don't lose your work. Otherwise, the form will save when you submit.*



Account Information Section

- Under the **Account Info** section, select your account numbers from the drop down boxes.

Vendor Supplier Section

- Next select the **Vendor Supplier Name** and **Source** from the dropdowns.
 - ✓ *Note: Select **Inhouse** as the vendor if it is a transfer.*

Animal Details Section

The **Animal Details** will be pulled in from your IACUC protocol and cannot be adjusted.

- **⚠ Important!**: Please note, sex is currently not modifiable in this section. Gender **must** be noted in the comments box.
- Please enter the **Quantity** you need and select the **USDA Pain Category**.
- Specify the **Age** and **Weight**, if necessary.
- Select the **Species Strain** from the dropdown. Manually enter species the **Other** field if species not listed in the dropdown. You will also need to enter the vendor catalog number at the bottom of this page as described in the [Request Section](#) below.
- Fill in pregnancy details, if necessary.
- Add additional **Comments**, if necessary. Please remember to put notes on gender here as well. If you are also ordering pups, please include quantity and sex of pups in this box as well.

Animal Details						
Species	Approved	On Order	On Hand	Used	Available	Percent Used
Species > Rabbit	10	0	2	2	8	20%

Group	Sex	Approved	Available	Quantity *	Remaining	USDA Pain Category
Purchased	Both or Either	10	8	<input type="text" value="2"/>	6	Category C <input type="button" value="v"/>
Total		10	8	2	6	

Age			Weight		
Min <input type="text" value="10"/>	Max <input type="text" value="12"/>	Units <input type="button" value="v"/> Months	Min <input type="text" value="150"/>	Max <input type="text" value="200"/>	Units <input type="button" value="v"/> grams

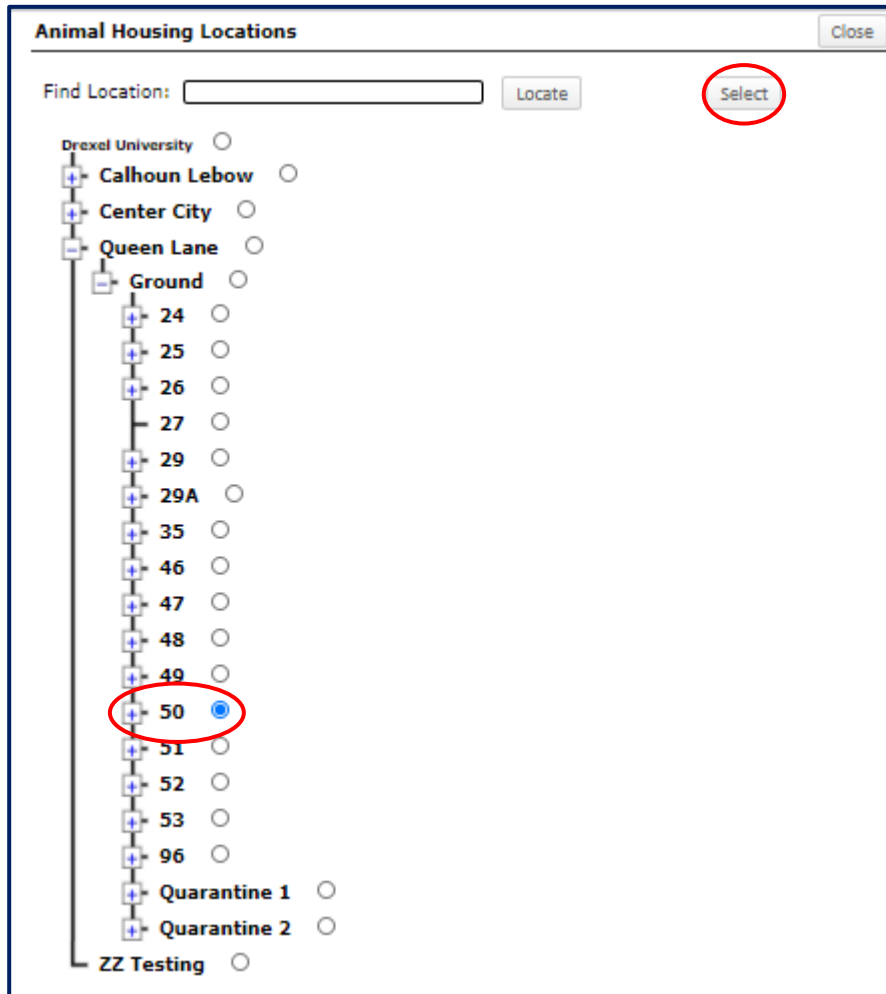
Species Strain <input type="button" value="v"/> Mice - A/J	Species Strain (Other) <input type="text"/>	
Pregnant <input type="radio"/> Yes <input checked="" type="radio"/> No	Gestation (days upon delivery) <input type="text"/>	Age of Pups/Young (days upon delivery) <input type="text" value="14"/>
Comments <input type="text" value="-All males
-8 male pups"/>		

Delivery Details Section

- Click the **Set** button next to the **Housing Location**. A new window will appear.

Delivery Details		
Housing Location <input type="button" value="Set"/> Check Availability	Housing Type * <input type="button" value="v"/>	
Qty Ordered <input type="text" value="2"/>	Number per enclosure <input type="text" value="0"/>	Enclosures
Request Delivery Instructions <input type="text"/>		

- In the new window, select your campus from the list. Be sure to use the plus arrows to expand the options so you can be as specific as possible. When you are done, press the **Select** button and the window will close.



- Choose the appropriate selection under the **Housing Type** dropdown of the **Delivery Details** section.
- Under **Request Delivery Instructions**, please specify housing conditions, if applicable (example: Singly housed).

Delivery Details		
Housing Location 15306	Set Check Availability	Housing Type * Mouse Barrier Cage ▼
Qty Ordered 2	Number per enclosure 5	Enclosures 1
Request Delivery Instructions Singly housed		

Delivery Schedule Section

- Use the calendar icon to request the **Desired Date** for delivery.
 - ✓ *Note: You will only be able to select dates based on vendor's schedule. Be sure to put in your request for the following week by the Tuesday at noon deadline.*
- Select the **Last Acceptable Date** that you are willing to acquire the delivery from the vendor.
- You can also use the **Generate a Duplicate Request** section to schedule a standing or recurring order of the same nature. Use the calendar icons to choose the dates for the future order (which can be updated at a later date, if necessary).

Delivery Schedule

Desired Date: * 16-Mar-2021

Last Acceptable Date: * 30-Mar-2021

Generate a Duplicate Request (information can be edited)

+ Add new record

Request Number	Desired Date	Last Acceptable Date	Delete
TBD	30-Mar-2021	08-Apr-2021	

Update Cancel

Request Section

- Please fill enter the strain codes for the vendor here if the strain was not listed above. Otherwise, leave blank.

Request

Vendor Catalog Number

Submit

- Return to the very top of the Request window and press the **Submit Request** button in the top right corner.

Species > Rabbit

Protocol LA-21-120 - Paul Investigator

Animal Facilities Management Order
Req-21-000022

Edit Mode

Submit Request

Protocol

Number LA-21-120 Requested By Paul Investigator

Title
New Protocol Created for Paul Investigator on 07-Feb-2021 9:55 AM

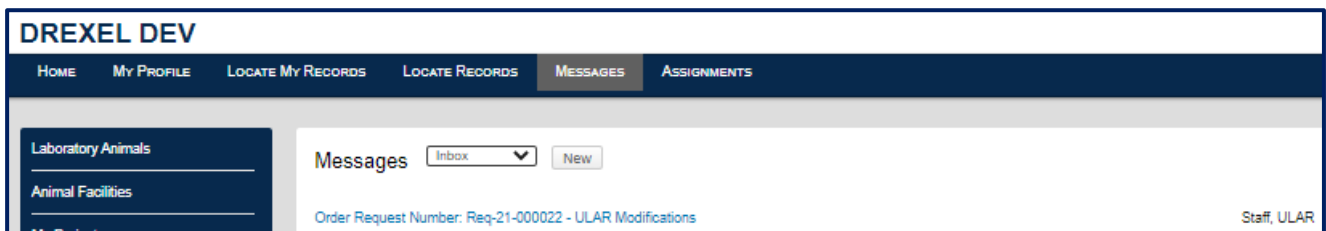
Post-Submission

Setting Up Initial Funds

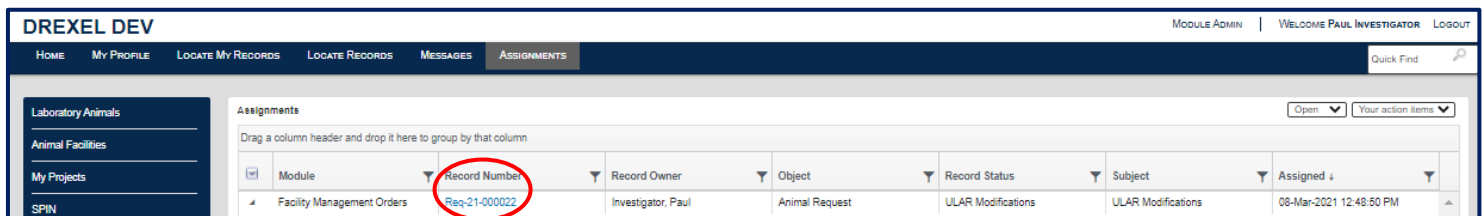
When your request is approved, you will receive an approval letter, which includes a link to a Qualtrics form where you can enter your fund information. This is an imperative step of the process. Please be sure to complete this form so a business administrator can enter it into the system.

Modifications Required

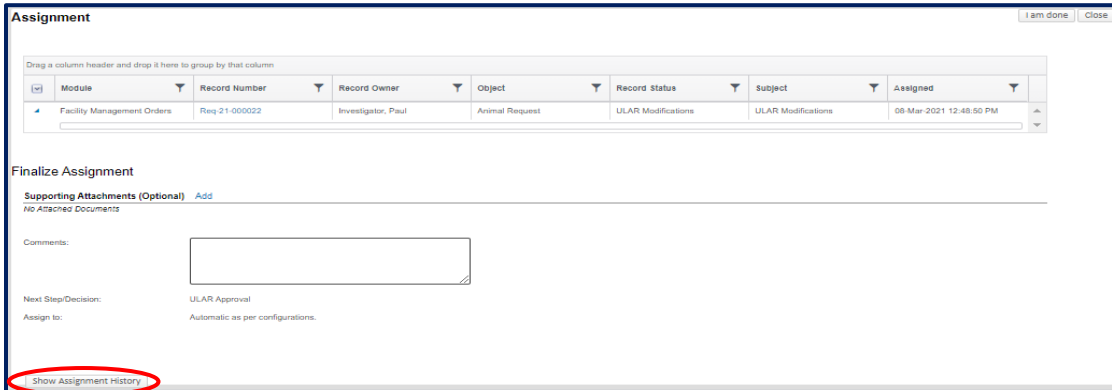
- Once you have submitted your request, the **Requisition Status** will now change to **ULAR Approval**. At this stage, the ULAR team will review your request and either approve it for submission, request modifications from you, or request modification approval from you if there is a counter offer from the vendor. If modifications are needed, the status will change to **ULAR Modifications**. To review the workflow definitions, please see the [Request Workflow Process](#) section above.
- If modifications are required, you will receive an email indicating so. The record will also show up in both the **Messages** and **Assignments** tabs of your homepage.
 - ✓ *Note: You can also access your request following the instructions detailed in the [Starting an Order](#) section above.*
 - In your **Messages** tab, you will see a message indicating that modifications are required:



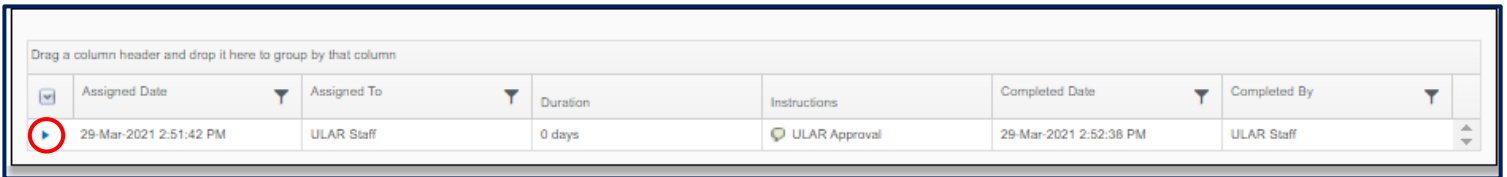
- In your **Assignments** tab, you will see the **Record Status** change to **ULAR Modifications**.
- ✓ *Note: You can click on the **Record Number** to open the Assignment.*



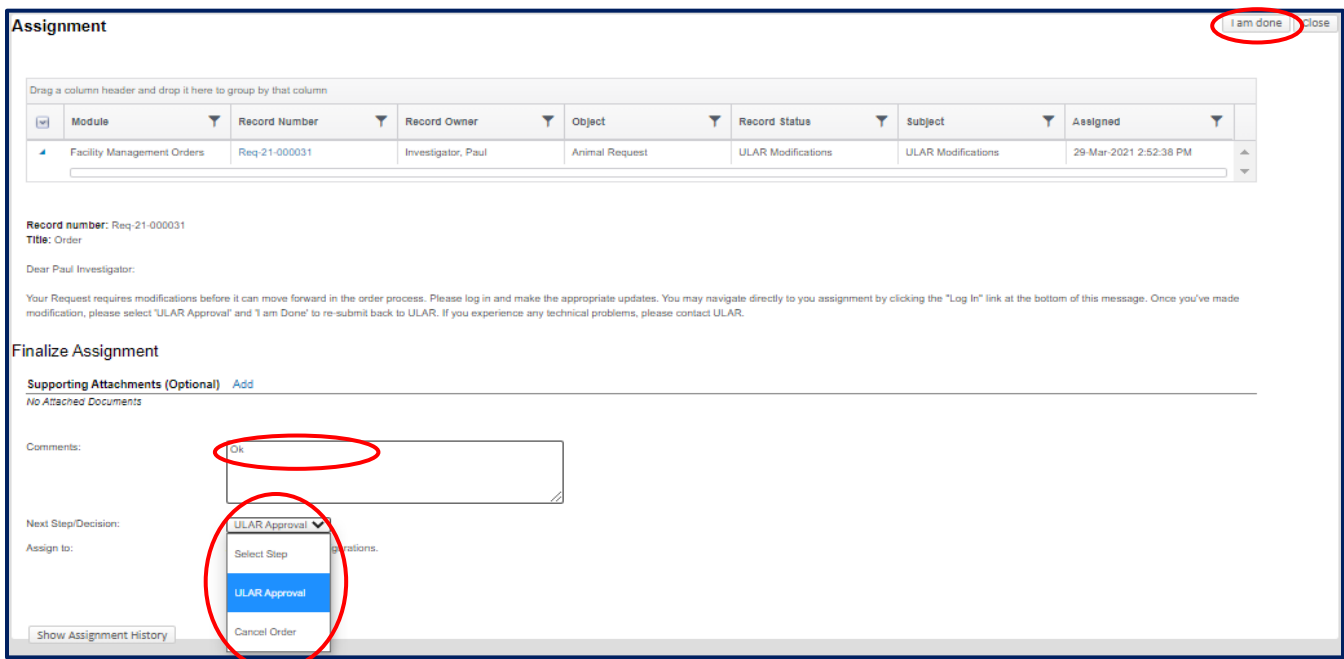
- You will see the **Assignment** window appear. You can click on the **Show Assignment History** button to view notes and changes made by the ULAR team.



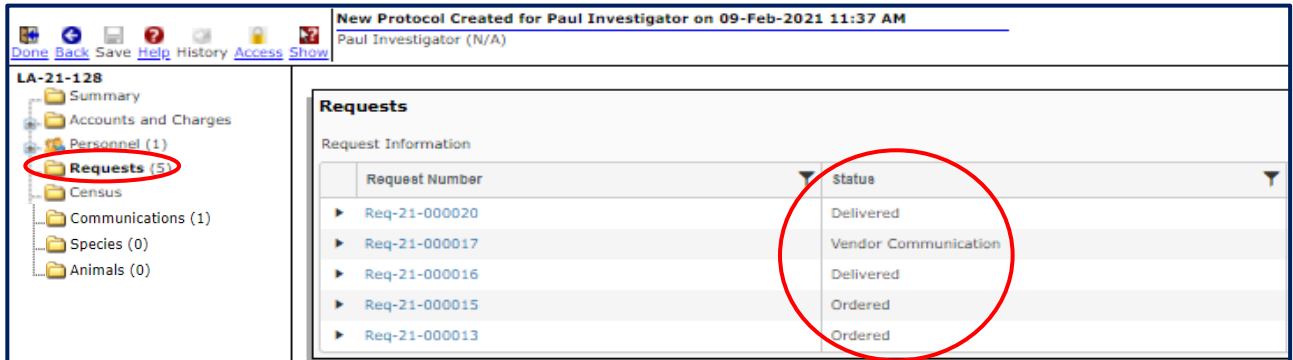
- Show Assignment History** listing your record and its different versions. Click the arrow next to the most recent version to expand the changes made to the record and read notes from the ULAR team.



- To approve or comment on the changes made by the ULAR team, please type your response in the **Comments** box. (Note: If the ULAR team noted that modifications are needed due to vendor counter offers, please review the changes respond by typing Ok in the comments, or typing a counter request.)
- Then select **ULAR Approval** from the **Next Step/Decision Drop Down** (or **Cancel Order**, if necessary). Send your note back to the ULAR team by clicking the **I am done** button in the top right corner.



- Repeat these steps as necessary if more modifications are required from the ULAR staff. Once the ULAR staff are satisfied with the modifications, the **Requisition Status** will change to **Vendor Communication**, indicating that the request has been communicated to the vendor.
- The PI will then get an email and an DragonSPOT message of status updates of next phases. For an explanation of the workflow statuses, please see the [Request Workflow Process](#) section above.
 - You can also view the status of this request and other requests of the same protocol by following the **Locate My Record** instructions in the [Starting an Order](#) section above, click **View** record, and then go to the **Requests** section.

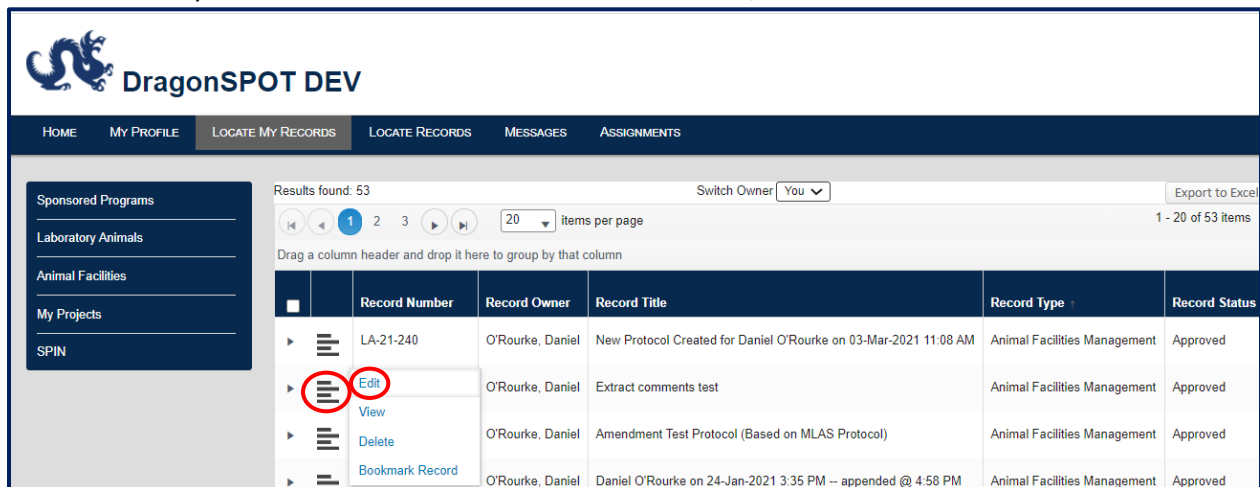


Cancelling or Editing Orders

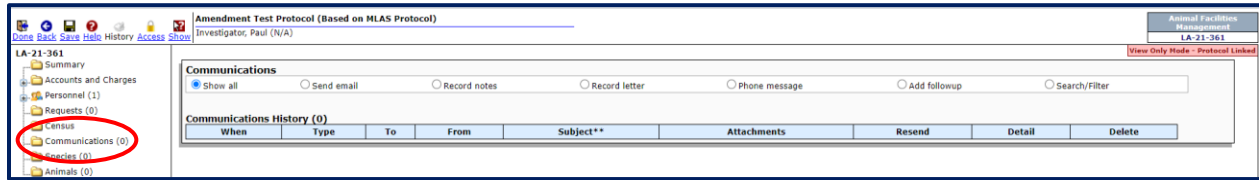
Cancelling or editing orders may only be done prior to ULAR approval. Once ULAR approves, the PI must email ular@drexel.edu to communicate changes or cancellations. They may also communicate within the record by going into protocol and accessing the **Communication** area on the left-hand menu.

Using the Communications Section of the Record

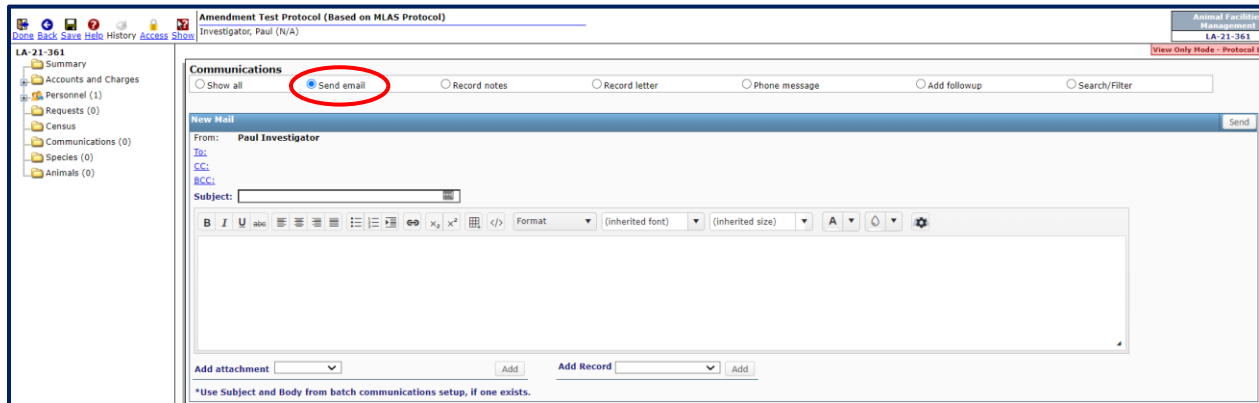
- Locate your record and click the three bars to left of it, then click **Edit**.



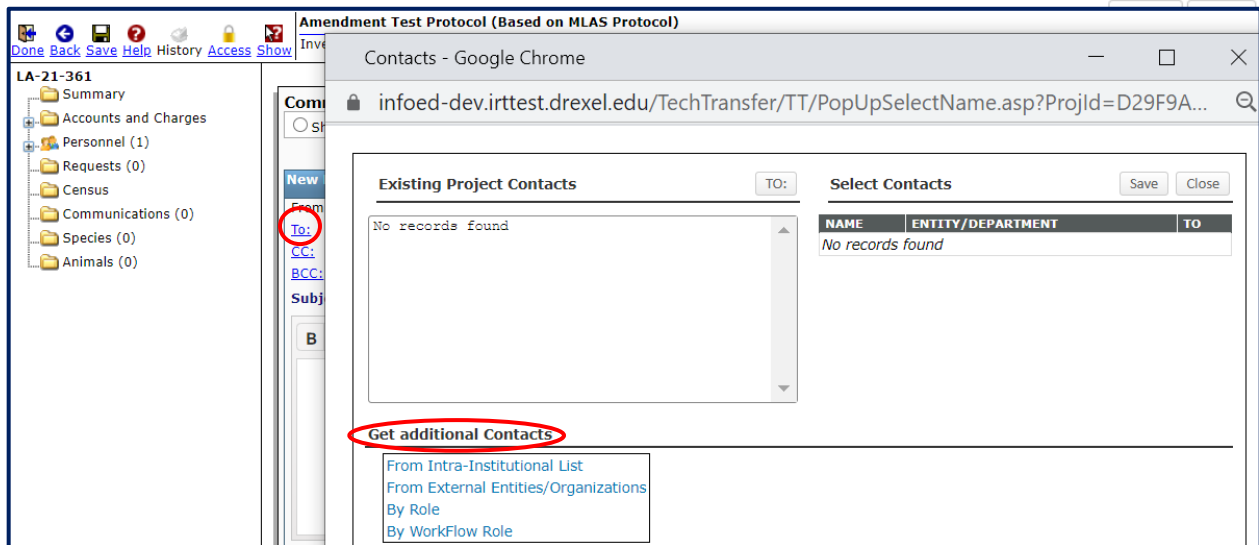
- Click on the **Communications** section from the left-hand menu.



- Click the **Send email** radio button. You will see a message area appear.



- Next, click the **To** button to access a new window where you can search for you recipient. Under the **Get additional Contacts** box, please select the way you would like to search for your recipient. In this example, I selected **From Intra-Institutional List**.



- A new window will appear where you can search by name or team. Select the recipient from the list and then press the **Select** button.

ulat

- Baez, Jennifer - D-7103-ULAR - Center City
- Brown, Katie A - D-7103-ULAR - Center City
- Campellone, Gianni A - D-7103-ULAR - Center City
- Carpenter, Sallyann - D-7103-ULAR - Center City
- Colwell, Lia L - D-7103-ULAR - Center City
- Daniels, Sean - D-7103-ULAR - Center City
- Huneke, Richard B - D-7103-ULAR - Center City
- McCurry, Andrea Maureen - D-7103-ULAR - Center City
- Peters-Hample, Maria F - D-7103-ULAR - Center City
- Prunes, Sierra - D-7103-ULAR - Center City
- Reed, Carlton E - D-7103-ULAR - Center City**
- Reimold, Emily S - D-7103-ULAR - Center City
- Robinson, Rory J - D-7103-ULAR - Center City
- Staff, ULAR - DU & ANS
- Villar, Luciana - D-7103-ULAR - Center City
- Witherspoon, Faith H - D-7103-ULAR - Center City

Select Close

- The recipient's name will now show up under the **Select Contacts** box. Press the **Save** button and then **Close**.

Existing Project Contacts TO: Select Contacts Save Close

Investigator, Paul
Morey, Rebecca

NAME	ENTITY/DEPARTMENT	TO
Villar, Luciana	D-7103-ULAR - Center City	<input checked="" type="checkbox"/>

Get additional Contacts

- From Intra-Institutional List
- From External Entities/Organizations
- By Role
- By WorkFlow Role

- Now you will see the name(s) in the **To** field above the message. **Please be sure to type your animal request record number in the subject line.** Please write your message in the box below. When you are finished, press the **Send** button.

Communications

Show all
 Send email
 Record notes
 Record letter
 Phone message
 Add followup
 Search/Filter

New Mail Send

From: Paul Investigator
To: Morey, Rebecca I
 Villar, Luciana
CC:
BCC:
Subject: Animal request record number here

B I U abo | [Rich Text Editor Icons] | Format | (inherited font) | (inherited size) | A | [Color Picker] | [Background Color]

Please cancel my order!

Add attachment [dropdown] [Add] Add Record [dropdown] [Add]

*Use Subject and Body from batch communications setup, if one exists.

- Once you have sent the email, it will be recorded in your **Communications** section as sent. The recipient will receive an email and DragonSPOT notification and can respond to you. You will receive an email and a message within DragonSPOT when they reply.

Amendment Test Protocol (Based on MLAS Protocol)
Investigator, Paul (N/A)

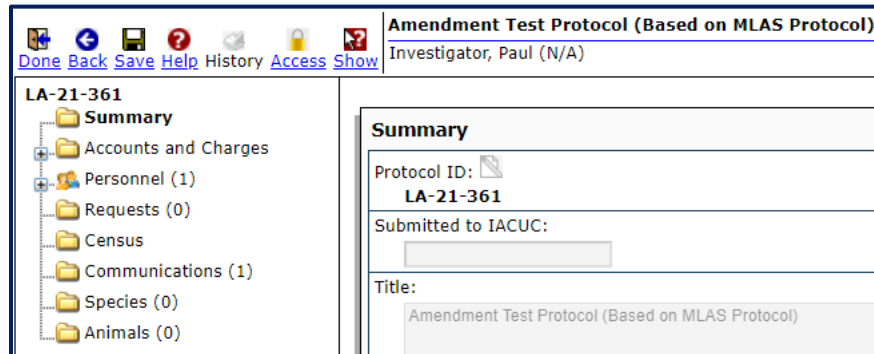
Show all
 Send email
 Record notes
 Record letter
 Phone message
 Add followup
 Search/Filter

Communications History (1)

When	Type	To	From	Subject**	Attachments	Resend	Detail	Delete
13-Apr-2021 03:43:38 PM	Email	To: Morey, Rebecca I	From: Investigator, Paul	Animal request record number here		[Resend Icon]	[Detail Icon]	[Delete Icon]

Navigating the Lefthand Animal Ordering Menu

- As discussed in the [Starting an Order](#) section above, to view your Requests, click the **Animal Facilities** module on the DragonSPOT homepage and then click on **Show a listing of All my records**. Click the bars to the left of the record number and then click **Edit** or **View** in the options that appear.
- You now know to click on the **Requests** button to place an animal order, but there are several other options in this menu, which are discussed below.



- **Summary:** On this page you can view an overview of the protocol information.
- **Accounts and charges:** This page shows all purchases and per diem configurations.
- **Personnel:** On this page you can view the lab assistants and PI(s) listed on the protocol.
- **Requests:** Submit a request for a new animal order.
- **Census:** The census shows charges broken down by count and location of animals. You can also view the animals currently at the facility.
- **Communications:** This is where you can send messages regarding you records within the DragonSPOT portal. Please see the above section on [Communications](#) for more information.
- **Species:** See a list of species affiliated with your protocol.
- **Animals:** Here you can view the animal inventory.