



Drexel University
DragonSPOT Animal
Ordering User
Manual

Office of Research and Innovation
Spring 2021

Contents

Introduction	2
Request Workflow Process	2
Accessing Drexel's DragonSPOT portal	3
Navigating the DragonSPOT Homepage	4
Creating and Submitting Your Animal Order	4
Starting an order	4
Saving the Form	6
Account Information Section	6
Vendor Supplier Section	6
Animal Details Section	7
Delivery Details Section	7
Delivery Schedule Section.....	9
Request Section	9
Submit.....	9
Post-Submission.....	10
Setting Up Initial Funds.....	10
Modifications Required.....	10
Cancelling or Editing Orders	12
Using the Communications Section of the Record	12
Navigating the Lefthand Animal Ordering Menu.....	16

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.

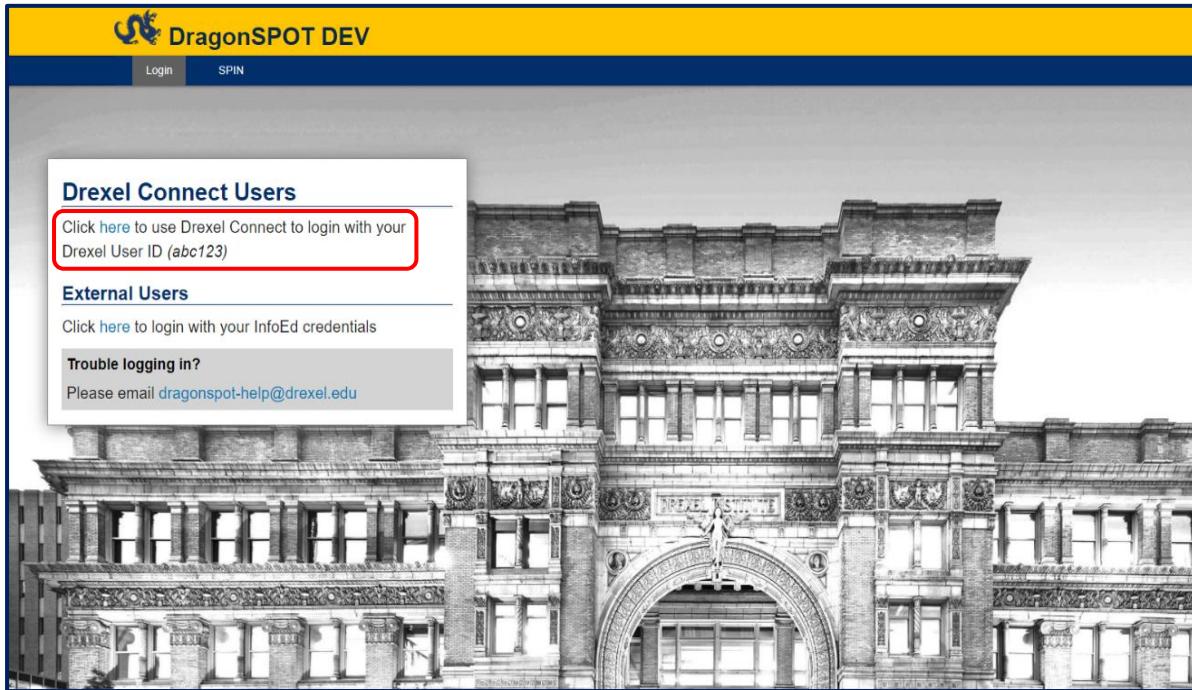
Request Workflow Process

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.

DREXEL CONNECT

Enter your user ID and password.

USER ID (WITHOUT @DREXEL.EDU)

PASSWORD

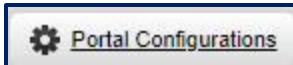
Drexel Connect allows you to access many Drexel services without needing your password again.

CONNECT

HELP & SETTINGS

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**.

A screenshot of the DragonSPOT homepage titled "DREXEL DEV". The top navigation bar includes links for HOME, MY PROFILE, LOCATE MY RECORDS (which is highlighted in red), LOCATE RECORDS, MESSAGES, and ASSIGNMENTS. On the left sidebar, there are links for Laboratory Animals, Animal Facilities (circled in red), My Projects, and SPIN. The main content area is titled "Animal Facilities" and contains a sub-section "Accessing Records/Reporting". It features a search bar "Locate records by using filters", a button "Show a listing of All my records" (circled in red), and a "Census" button.

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

A screenshot of the "Locate My Records" page titled "DREXEL DEV". The top navigation bar includes links for HOME, MY PROFILE, LOCATE MY RECORDS (circled in red), LOCATE RECORDS, MESSAGES, and ASSIGNMENTS. The main content area displays a table of results found (34 items). The table columns are Record Number, Record Owner, Record Title, Record Type, and Record Status. One row in the table has the "Edit" option circled in red. The table also includes pagination controls (1-20 of 34 items) and a "Switch Owner" dropdown.

- 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.

The screenshot shows a software interface titled 'New Protocol Created for Paul Investigator on 07-Feb-2021 9:55 AM'. The left sidebar shows navigation links for Summary, Accounts and Charges, Personnel (1), Requests (1), Census, and Animals (50). The main area is titled 'Requests' and contains a table with columns: Request Number, Status, Request Type, Species, Qty Requested, Qty Checked In, and Delete. One row is visible: Req-21-000012, Ordered, Animal Request, Mouse (Mus musculus), 50, 50. A 'Create Request' button is located at the top right of the table.

- 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.

The screenshot shows a 'Create New Request' dialog box. At the top, it says 'Request #: Req-21-000022' and 'PI: Paul Investigator'. Below this is a table for selecting a species:

Select	Species	Approved	On Order	On Hand	Used	Available	Percent Used
<input checked="" type="radio"/>	Species > Rabbit	10	0	0	0	10	0%
<input type="radio"/>	Species > Mouse - Mouse (Mus musculus)	100	0	50	50	50	50%
<input type="radio"/>	Species > Rat - Rat (Rattus rattus)	50	0	0	0	50	0%

Below the table is an 'Animal Source' section with three radio buttons: 'Vendor' (selected), 'Transfer', and 'Import'. The entire dialog box is circled in red.

- 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.

The screenshot shows the same 'New Protocol Created for Paul Investigator' window as before. The 'Requests' table now has two rows. The first row is highlighted with a red circle around its Request Number: Req-21-000022, Status: New Request, Request Type: Animal Request, Species: Rabbit, Qty Requested: 0, Qty Checked In: 0. The second row is Req-21-000012, Ordered, Animal Request, Mouse (Mus musculus), 50, 50. A trashcan icon is circled in red in the 'Delete' column of the first row.

- 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 to 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.

The screenshot shows the 'Protocol' section of a web-based form. At the top, there's a navigation bar with icons for Done, Back, Save, Help, History, Access, and Show. The 'Save' button is highlighted with a red circle. The main area is divided into two columns: 'Request' (containing Request Req-21-000022, Request, Status History, Assignments) and 'Protocol' (containing Protocol Number LA-21-120). The 'Protocol' section is where the red circle is placed.

Account Information Section

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

This screenshot shows the 'Protocol' and 'Account Info' sections of the form. The 'Protocol' section includes fields for Number (LA-21-120), Requested By (Paul Investigator), Title (New Protocol Created for Paul Investigator on 07-Feb-2021 9:55 AM), Approved From (09-Feb-2021), Approved To (08-Feb-2024), Principal Investigator (Paul Investigator), Department (DU & ANS), and Phone/Fax/Email information. The 'Account Info' section at the bottom contains three tabs: Purchase Charges, Per Diem Charges, and Procedure Charges. Each tab has an 'Account Number' dropdown and a 'Get/Set' button. A large red oval encloses the entire 'Protocol' section, and another large red oval encloses the 'Account Info' section.

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.

A small dialog box titled 'Vendor Supplier' with two dropdown menus. The first dropdown under 'Name:' contains 'Charles River Laboratories'. The second dropdown under 'Source:' contains 'Vendor'.

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.

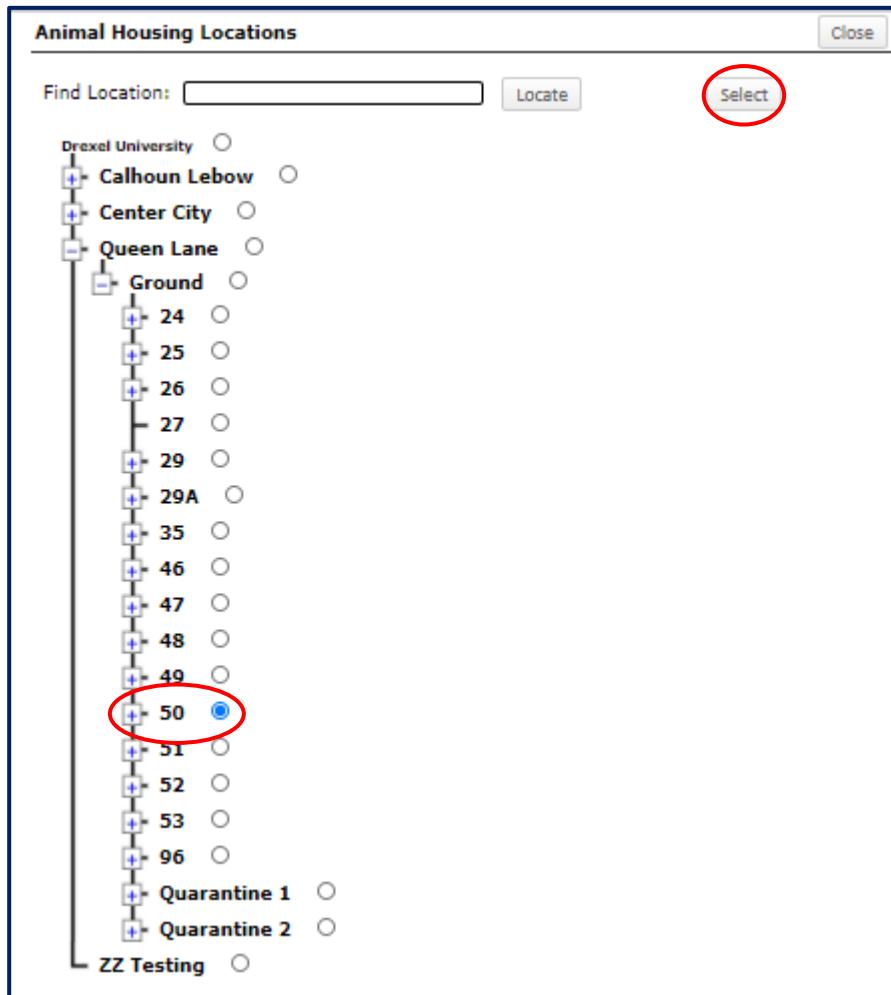
Animal Details						
Species	Approved	On Order	On Hand	Used	Available	Percent Used
Species > Rabbit	10	0	2	2	8	20%
Group	Sex	Approved	Available	Quantity *	Remaining	USDA Pain Category
Purchased	Both or Either	10	8	2	6	Category C
Total	10	8	2		6	
Age			Weight			
Min 10	Max 12	Units Months	Min 150	Max 200	Units grams	
Species Strain Mice - A/J	Species Strain (Other)					
Pregnant <input type="radio"/> Yes <input checked="" type="radio"/> No	Gestation (days upon delivery)	Age of Pups/Young (days upon delivery) 14				
Comments -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 Drexel University	Set Check Availability	Housing Type *
Qty Ordered 2	Number per enclosure 0	Enclosures
Request Delivery Instructions		

- 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).

The screenshot shows a "Delivery Details" form. At the top left is a "Housing Location" dropdown with "15306" selected. To its right are "Set" and "Check Availability" buttons. On the far right is a "Housing Type" dropdown, which is circled in red and set to "Mouse Barrier Cage". Below this is a table with three rows:

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	<input checked="" type="checkbox"/> Update <input type="checkbox"/> 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-21-00022
			<input type="button" value="Edit Mode"/> <input type="button" value="Submit Request"/>
Protocol			
Number	LA-21-120	Requested By Set Paul Investigator	
Title New Protocol Created for Paul Investigator on 07-Feb-2021 9:55 AM			

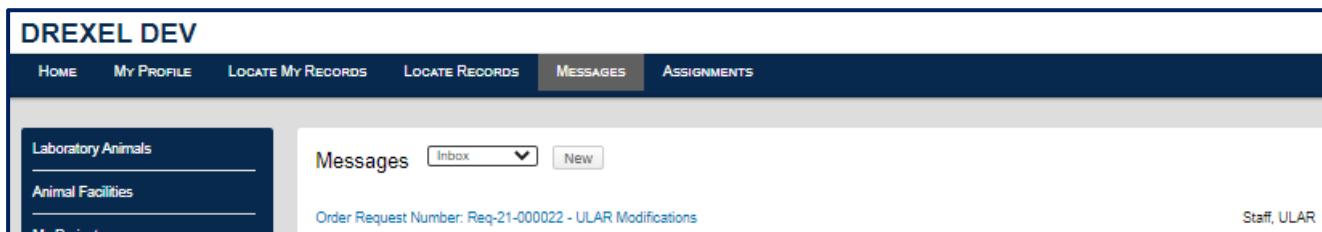
Post-Submission

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.

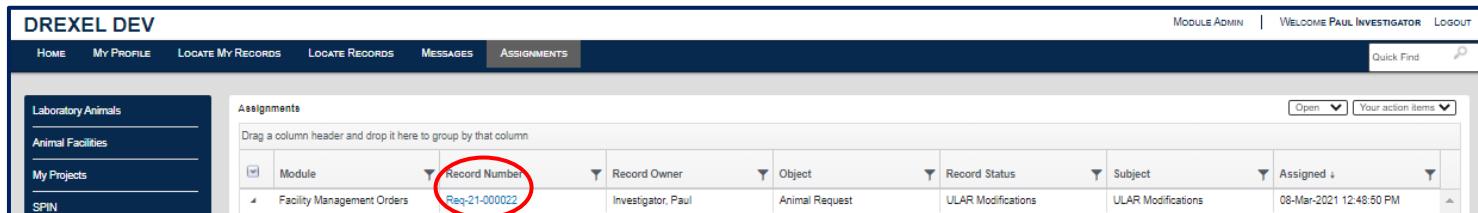
Modifications Required

- 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:



The screenshot shows the Drexel DEV homepage with a dark blue header. The header contains links for HOME, My PROFILE, LOCATE MY RECORDS, LOCATE RECORDS, MESSAGES (which is highlighted in blue), and ASSIGNMENTS. Below the header, there's a sidebar with sections for Laboratory Animals, Animal Facilities, and My Projects. The main content area has a "Messages" section with an "Inbox" dropdown and a "New" button. A note at the bottom says "Order Request Number: Req-21-000022 - ULAR Modifications". In the bottom right corner, it says "Staff, ULAR".

- 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.



The screenshot shows the Drexel DEV Assignments tab. The top navigation bar includes links for HOME, My PROFILE, LOCATE MY RECORDS, LOCATE RECORDS, MESSAGES, and ASSIGNMENTS (which is highlighted in blue). On the far right, there are links for MODULE ADMIN, WELCOME PAUL INVESTIGATOR, and LOGOUT. Below the navigation, there's a sidebar with sections for Laboratory Animals, Animal Facilities, My Projects, and SPIN. The main content area displays a table titled "Assignments" with columns for Module, Record Number, Record Owner, Object, Record Status, Subject, and Assigned. One row in the table is circled in red, showing "Facility Management Orders" under Module, "Req-21-000022" under Record Number, "Investigator, Paul" under Record Owner, "Animal Request" under Object, "ULAR Modifications" under Record Status, "ULAR Modifications" under Subject, and "08-Mar-2021 12:48:50 PM" under Assigned.

- 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.

Assignment

Module	Record Number	Record Owner	Object	Record Status	Subject	Assigned
Facility Management Orders	Req-21-000022	Investigator, Paul	Animal Request	ULAR Modifications	ULAR Modifications	06-Mar-2021 12:48:50 PM

Finalize Assignment

Supporting Attachments (Optional) [Add](#)
No Attached Documents

Comments:

Next Step/Decision: **ULAR Approval**
Assign to: Automatic as per configurations.

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.

Assigned Date	Assigned To	Duration	Instructions	Completed Date	Completed By
29-Mar-2021 2:51:42 PM	ULAR Staff	0 days	ULAR Approval	29-Mar-2021 2:52:38 PM	ULAR Staff

- 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.

Assignment

Module	Record Number	Record Owner	Object	Record Status	Subject	Assigned
Facility Management Orders	Req-21-000031	Investigator, Paul	Animal Request	ULAR Modifications	ULAR Modifications	29-Mar-2021 2:52:38 PM

Record number: Req-21-000031
Title: Order
Dear Paul Investigator:
Your Request requires modifications before it can move forward in the order process. Please log in and make the appropriate updates. You may navigate directly to your assignment by clicking the "Log In" link at the bottom of this message. Once you've made modification, please select "ULAR Approval" and "I am Done" to re-submit back to ULAR. If you experience any technical problems, please contact ULAR.

Finalize Assignment

Supporting Attachments (Optional) [Add](#)
No Attached Documents

Comments: **Ok**

Next Step/Decision: **ULAR Approval** ▾
Assign to: Automatic as per configurations.

Show Assignment History

- 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.

The screenshot shows the DragonSPOT software interface. At the top, there's a toolbar with various icons and the text "New Protocol Created for Paul Investigator on 09-Feb-2021 11:37 AM" and "Paul Investigator (N/A)". Below the toolbar, the left sidebar displays a navigation tree for protocol LA-21-128, including Summary, Accounts and Charges, Personnel (1), Requests (5) (which is circled in red), Census, Communications (1), Species (0), and Animals (0). The main right panel is titled "Requests" and contains a table with "Request Information". The table has columns for Request Number and Status. The data is as follows:

Request Number	Status
► Req-21-000020	Delivered
► Req-21-000017	Vendor Communication
► Req-21-000016	Delivered
► Req-21-000015	Ordered
► Req-21-000013	Ordered

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.

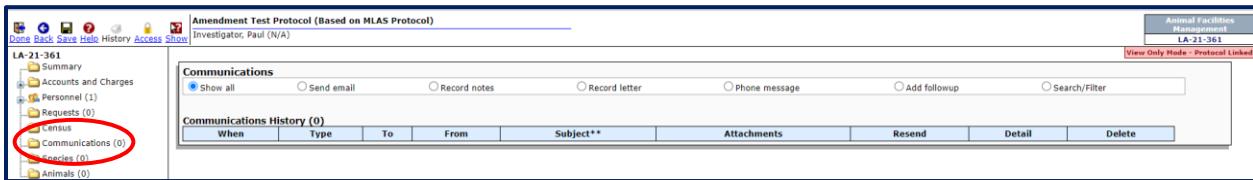
Using the Communications Section of the Record

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

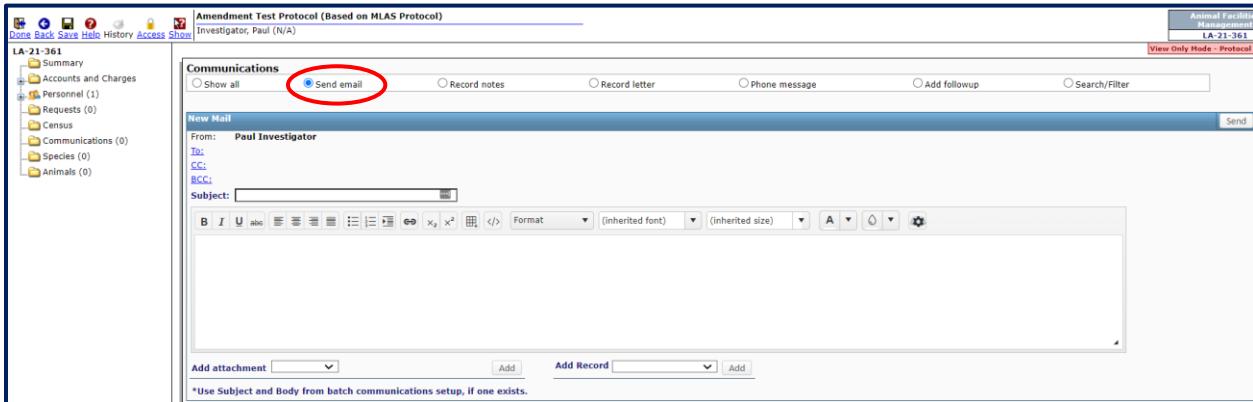
The screenshot shows the DragonSPOT DEV interface. At the top, there's a logo and the text "DragonSPOT DEV". Below the logo is a navigation bar with links for HOME, MY PROFILE, LOCATE MY RECORDS (which is highlighted in blue), LOCATE RECORDS, MESSAGES, and ASSIGNMENTS. The main content area has a sidebar with links for Sponsored Programs, Laboratory Animals, Animal Facilities, My Projects, and SPIN. The main table lists results found: 53 items per page, with page 1 selected. The table columns are Record Number, Record Owner, Record Title, Record Type, and Record Status. The data is as follows:

	Record Number	Record Owner	Record Title	Record Type	Record Status
►	LA-21-240	O'Rourke, Daniel	New Protocol Created for Daniel O'Rourke on 03-Mar-2021 11:08 AM	Animal Facilities Management	Approved
►	Edit	O'Rourke, Daniel	Extract comments test	Animal Facilities Management	Approved
►	Edit	O'Rourke, Daniel	Amendment Test Protocol (Based on MLAS Protocol)	Animal Facilities Management	Approved
►	Edit	O'Rourke, Daniel	Daniel O'Rourke on 24-Jan-2021 3:35 PM – appended @ 4:58 PM	Animal Facilities Management	Approved

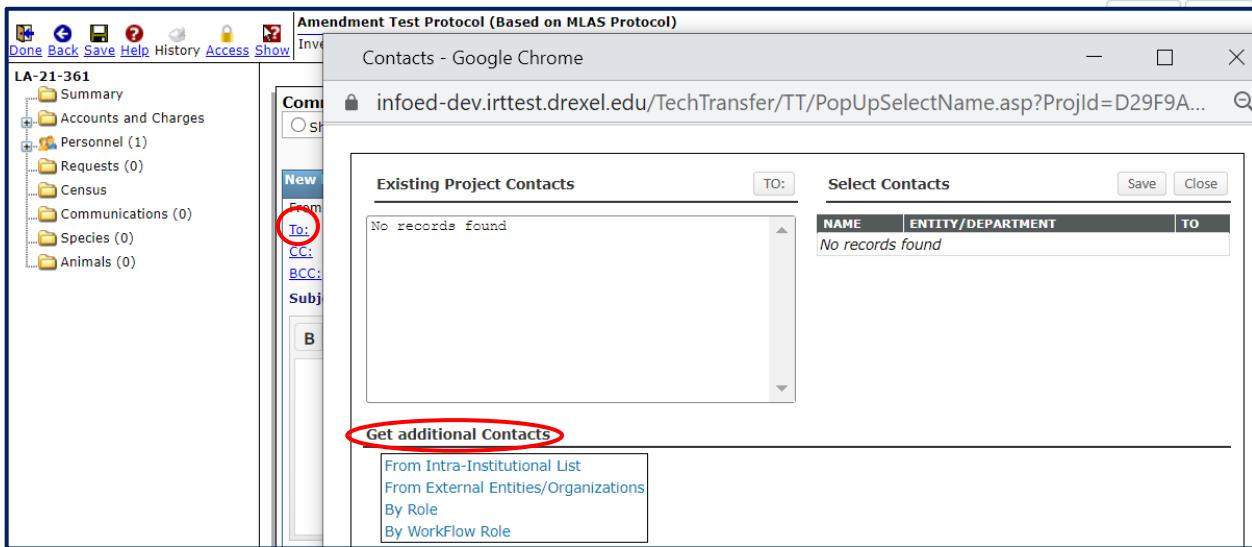
- Click on the **Communications** section from the left-hand menu.



- 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 your 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.

ular

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-Hamble, 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

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

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

Existing Project Contacts TO:

Investigator, Paul
 Morey, Rebecca

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.

New Mail

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

Please cancel my order.

Add attachment Add Record 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.

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				

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.

The screenshot shows the DragonSPOT Animal Ordering interface. At the top, there is a toolbar with icons for Done, Back, Save, Help, History, Access, and Show. The main title is "Amendment Test Protocol (Based on MLAS Protocol)" and the investigator is listed as "Investigator, Paul (N/A)". On the left, a sidebar titled "LA-21-361" lists navigation options: Summary, Accounts and Charges, Personnel (1), Requests (0), Census, Communications (1), Species (0), and Animals (0). The right panel is titled "Summary" and contains fields for "Protocol ID" (set to LA-21-361), "Submitted to IACUC" (a dropdown menu), and "Title" (set to "Amendment Test Protocol (Based on MLAS Protocol)").

- 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 your 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.