User Guide for Investigators
and Group Members
eSirius Introduction

eSirius is a web-enabled product comprising a fully integrated group of applications to manage Animal Resource Facility (ARF) functions. Researchers have access to a personal eSirius home-page providing them with a single point of access ARF related information.

eSirius Users

There are two types of eSirius users: Office and Enterprise.

Office users:
Are department veterinarians; animal buyers, facility supervisors, and receiving technicians... Depending on the rights assigned to each individual, office users may access any data in the system.

Enterprise users:
Are Principal Investigators and their staff. In the Expert security set-up, a group is created for each PI, and individuals are linked to those groups. Enterprise users may access only those protocols and requisitions belonging to the group owner (Principal investigator) of the group to which they belong.

Access to data in the system is controlled in eSirius Expert; office users may retrieve all data and enterprise users may access only their own.

Dual Memberships

Enterprise users may be linked to more than one group. When you login, if you have one group association eSirius will default to that group. If you have more than one, you are prompted to select the group for login.
Login

Login for Principal Investigator

Open your web browser and locate the URL assigned to eSirius on your institution's website.

At the eSirius login screen type your user ID and password and click ‘Login to eSirius’. The default user ID is your first initial and last name. A different user ID and may have been assigned by your eSirius Administrator.

If you are both a Principal Investigator and are a member of another Principal Investigator’s group you will have been assigned ‘dual memberships’. See Dual Memberships for specific log-in instructions.

If you do not have a dual role or dual membership, you will be taken directly to your homepage after entering a user ID and password:
Login for PI Staff Member

Open a web browser and locate the URL assigned to eSirius on your institution’s website.

At the eSirius login screen type your user ID and password and click ‘Login to eSirius’. The default user ID is your first initial and last name. A different user ID may have been assigned by your eSirius Administrator.

As an Investigator Staff Member, you may belong to multiple groups. If so, you will see a page to choose the group membership for this login.
In this example, Mickey Mouse is the research technician who works for both Abraham Lincoln and George Washington. If he chooses the Lincoln group when logging in, then he will see protocols, requisitions etc. belonging to Abraham Lincoln. Conversely, when choosing the Washington group at login, he will see data belonging to George Washington.

After choosing a group and clicking Continue to home page, your homepage should appear. See next section, **Home Page** for navigation instructions.

## Home Page

**Alerts**
- [ ] Required Fields
- [ ] Home Page
- [ ] eSirius Login Options
- [ ] Mouse, Mickey
- [ ] PI

**Home Page**
- **Alerts**
- [ ] Required Fields
- [ ] Home Page
- [ ] eSirius Login Options
- [ ] Mouse, Mickey
- [ ] PI

### Required Fields

In this example, Mickey Mouse is the research technician who works for both Abraham Lincoln and George Washington. If he chooses the Lincoln group when logging in, then he will see protocols, requisitions etc. belonging to Abraham Lincoln. Conversely, when choosing the Washington group at login, he will see data belonging to George Washington.

After choosing a group and clicking Continue to home page, your homepage should appear. See next section, **Home Page** for navigation instructions.
The grey stripe across the top of the window displays your current location (in this example 'Home Page'), your name (in this example, the name of the investigator is George Washington), your security role, (PI for Principal Investigator or Investigator Staff) links to 'Sign out' and 'Refresh', and today's date. On a PI Group Member's home page, the member's name would display just before the PI’s name – for example, Mouse, Mickey/Washington, George.

To the left of the page is the table of contents. Clicking on an item in the table of contents will take you to that portion of your home page.

Change Password
The Password option allows you to change your password; click on password in the TOC and follow the on-page instructions.

Applications and Options
The blue stripes - Animal Orders, and Animal Husbandry – are a couple applications under which a user may have some or all of the related options assigned by the eSirius administrator. The names of the options used in this manual are the ‘out-of-box’ names, but the eSirius administrator at your institution may have changed them. The various options are defined here; instructions for each option are discussed at length in the subsequent sections of this manual.

Protocol Options:
- View Protocol Species Usage Register – allows you to search for your approved protocols and see the numbers of animals remaining on each.
- All other Protocol details and items will remain on the ARC’s website. http://www.oprs.ucla.edu/animal/
**Animal Order Options:**
- Create New Animal Order (multiple sources) – create an order from your list of approved protocols
- Create New Animal Order from Template – create an order from your list of approved protocols using a previously saved order as a starting point
- Create a New Standing Order – create a plan for a new standing order
- Requisition Search – search and view a list of your requisitions(orders)
- View Animal Receipt Reports – search and view/print reports of your received requisitions, selected and sorted by search criteria you enter

**Alerts**
Alerts, like Options, are assigned to individual users by the eSirius Administrator using the desktop application, Expert. Alerts display protocols or requisitions requiring action by someone. Some alerts also have a workflow status indicating who should take action.

**Animal Order Alerts**

<table>
<thead>
<tr>
<th>Alert</th>
<th>Why a requisition is displayed here</th>
<th>Who sees it A = always W=workflow status dependent</th>
<th>Workflow statuses - indicate who can (and should) open the requisition and take action</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Animal Orders</td>
<td>When the PI or staff member submits a new order to the animal office</td>
<td>PI and PI Staff(A) Facility Supervisor(W) Animal Buyer(A)</td>
<td>Facility Supervisor Animal Buyer</td>
</tr>
<tr>
<td>Placed Orders</td>
<td>When the order has been confirmed by the vendor</td>
<td>PI and PI Staff(A)</td>
<td>n/a</td>
</tr>
<tr>
<td>Wait Listed Orders</td>
<td>When the order has been Backordered by the vendor.</td>
<td>PI and PI Staff(A) Facility Supervisor (A) Animal Buyer(A)</td>
<td>n/a</td>
</tr>
<tr>
<td>Delivery Schedule</td>
<td>When the order has been confirmed by the vendor (displays if scheduled delivery date is between 8 and 1 days from today)</td>
<td>Animal Buyer (A) Facility Supervisor (A) Receiving technician(A)</td>
<td>n/a</td>
</tr>
<tr>
<td>Alert</td>
<td>Why a requisition is displayed here</td>
<td>Who sees it</td>
<td>Workflow statuses - indicate who can (and should) open the requisition and take action</td>
</tr>
<tr>
<td>----------------------------</td>
<td>------------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Animal Receipts Due</td>
<td>Order moves from delivery schedule to here on the scheduled delivery date. It stays here until received in system.</td>
<td>Animal Buyer (A) Facility Supervisor (A) Receiving technician(A)</td>
<td>n/a</td>
</tr>
<tr>
<td>Animal Receipt</td>
<td>When an order has been received in eSirius. This alert remains on the PI’s home page for 7 days.</td>
<td>PI and PI Staff (A)</td>
<td>n/a</td>
</tr>
<tr>
<td>Protocol usage</td>
<td>When animal usage on a protocol reaches 90%</td>
<td>PI and PI Staff (A)</td>
<td>n/a</td>
</tr>
<tr>
<td>New Standing Orders</td>
<td>When a STO is created – it displays here until approved by animal buyer.</td>
<td>-PI and PI Staff(A) -Facility Supervisor (W) -Animal Buyer (A)</td>
<td>-Facility Supervisor -Animal Buyer</td>
</tr>
<tr>
<td>Animal Standing Orders Due</td>
<td>Each upcoming shipment of a standing order appears here a preset number of days prior to expected delivery date. When accepted by animal buyer, it moves to the Alert-Placed Orders for PI and Alert-Delivery Schedule for Office Staff. If skipped by the Animal Buyer it no longer appears here.</td>
<td>-PI and PI Staff(A) -Animal Buyer(A)</td>
<td>n/a</td>
</tr>
<tr>
<td>Lapsed Standing Orders</td>
<td>If an upcoming shipment is neither accepted nor skipped, it moves to this alert on the expected delivery date.</td>
<td>-PI and PI Staff(A) -Animal Buyer(A)</td>
<td>n/a</td>
</tr>
</tbody>
</table>
Animal Order Management – How Do I:

Once you have approved protocols in eSirius, you may submit an animal order request to the Animal Resource Facility (ARF).

Submit an Order Request

Choose the option Create New Animal Order (multiple sources). You are presented with a list of your approved protocols. Note the authorized number and the balance of animals are displayed, as is the expiration date.

Select a protocol and click continue.

Here you select the source of animals which will determine the type of requisition. Each type of requisition has different questions on the first page. Instructions on the screen will help you determine the correct choice. Choose the source and click Continue. (wildlife capture will NOT be listed in eSirius LIVE)
Page One of an Animal Requisition for Non-Commercial Sources (Import Orders only) On this type requisition, you are asked to provide information about the shipping institution, and the carrier.

Order Info

Animal Source Info

Non-Commercial Sources

Please enter all information pertinent to Shipping PT

Shipping Company

Shipping dizzy

Human shipping

animals, if different

From PT

Shipper Address

Shipper phone numbers including area code

Shipper fax number Including area code

Shipper e-mail address

Response Tracking #: 

Requester Info

Confirm phone number and e-mail id of person to notify about this order

Requester Phone

Requester Email

Sponsor Information

If this order will be paid for by a person other than the PI who owns the protocol, please indicate so and enter the name of this person.

Will this purchase be paid for by someone other than the PI? 

Payee First Name

Middle Initial
Complete all required fields and click Continue. For page two instructions see Page Two of all Animal Requisitions

Page One of an Animal Requisition for Vendor Purchases

This type requisition has a field to identify your requested vendor.

Select commercial vendor from approved list of vendors, and write specific notes or instructions, if any, for this vendor.

Confirm phone number and e-mail id of person to notify about this order.

If this order will be paid for by someone other than the PI who owns the protocol, please indicate so and enter the name of this person.
Page Two of all Animal Requisitions

The Item Information section is the same on page two of all type requisitions. Each type requisition repeats some of the sections from page one on page two, but the page two Item Information section is the same regardless of the requisition type. Complete all required sections. You are restricted to two lines per order.

When you have completed all required fields for your order, click Submit to Facility at the bottom of the page.

To follow the status of your order see Track a Submitted Order

Save a Requisition as a Template to Use for Future Requisitions

When you are creating any requisition, there is a section named ‘Save as Template’ near the bottom of the second page. Check the ‘Save as Template for future use’ check box, name the template and click Save and Continue. This feature allows the user to quickly duplicate a frequently submitted animal order. Once the template is saved, you may recall it, enter a new requested delivery date and submit it to the animal office. Create a New Requisition from a Template
Create a New Requisition from a Template
Once you have used the feature to memorize a requisition as a template, you may recall that template to create a new requisition. From your eSirius homepage, choose ‘Create a New Animal Order from Template’.

Select your memorized template by clicking on the order #/hyperlink. The memorized requisition is displayed for you to edit if desired, select a new delivery date and submit to the animal office. The new order has a new order number.

Cancel a Requisition
You may NOT cancel an order directly in eSirius. You must email Tensie Palmer (tpalmer@mednet.ucla.edu) or Shama Chudawala (schudawala@mednet.ucla.edu) to cancel a requisition with the Procurement Office. If the order has been packed to ship, or the vendor has other restrictions, you may not cancel that particular shipment.

Submit a Standing Order Request
The Standing Order process allows you to create a requisition with regularly recurring identical shipments. The animal buyer will contact the vendor to arrange for shipments based upon your request. From your home page, select the option ‘Create a New Standing Order’. You are presented with a list of your approved protocols to choose from:

Select a protocol and click Continue. It is assumed that all standing orders will be vendor purchases and so you see only ‘Vendor Purchases’ to select.
Select vendor purchases and click Continue.
You will see and need to complete the first two pages of a vendor requisition, Order Information and Line Item Information. At the bottom of the second page, you will see a new section, Standing Order Delivery Schedule. Complete the required fields to indicate how often you would like to receive a shipment.
Initial expected delivery date = first shipment date
Standing order expiration date = optional (leave this blank if you want the order to continue indefinitely.)
Choose if order should occur on a weekly basis or a monthly basis and specify on Tuesday (our regular delivery day). You may also indicate a maximum number of shipments.

Standing Order Delivery Schedule

Enter the delivery schedule for this Standing Order

Requester Info

Confirm phone number and email ID of person to notify about this order

8/27/09
When all required fields are complete, click Submit to Facility. When you create a new standing order, what you are actually doing is creating a plan. The standing order plan appears in an alert, ‘New Standing Orders’ where you may follow its progress by checking the workflow status. The facility supervisor approves it, and then the workflow status says Animal Buyer.

<table>
<thead>
<tr>
<th>Alert New Standing Orders</th>
<th>Order Date</th>
<th>Requestor</th>
<th>Protocol</th>
<th>Species</th>
<th>Workflow Status</th>
<th>PI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charles River</td>
<td>09/01/2004</td>
<td>Washington, George</td>
<td>2004-0004</td>
<td>Mouse</td>
<td>Facility Supervisor</td>
<td>Washington, George</td>
</tr>
</tbody>
</table>

When the Animal Buyer approves the plan and confirms shipment dates with the vendor, the plan is no longer in the Alert-New Standing Orders. Your protocol has not yet been debited. eSirius will generate an alert a preset number of days prior to the first shipment.

<table>
<thead>
<tr>
<th>Alert New Standing Orders Due</th>
<th>Order #</th>
<th>Principal Investigator</th>
<th>Expiration Date</th>
<th>SO Order Date</th>
<th>Description</th>
<th>Expected Date</th>
<th>Protocol</th>
<th>Other Source</th>
<th>Requestor</th>
<th>Vendor/Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>9010100001</td>
<td>Washington, George</td>
<td>08/15/2009</td>
<td>09/15/2006</td>
<td>Test</td>
<td>10/15/2006</td>
<td>0004</td>
<td>Washington, George</td>
<td>Charles River</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>9010100002</td>
<td>Washington, George</td>
<td>08/15/2009</td>
<td>09/15/2006</td>
<td>Test</td>
<td>10/15/2006</td>
<td>0004</td>
<td>George Animal</td>
<td>Charles River</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>9010100003</td>
<td>Washington, George</td>
<td>08/15/2009</td>
<td>09/15/2006</td>
<td>Test</td>
<td>10/15/2006</td>
<td>0004</td>
<td>Washington, George</td>
<td>Justin Laboratories</td>
<td></td>
</tr>
</tbody>
</table>

The animal buyer must open the order from the alert and accept or reject the shipment.

Once a shipment is accepted, eSirius will create a line item for the requisition and debit the protocol. The order moves to the Alert-Delivery schedule for Animal Buyer and to Alert-Placed Orders for the PI.

**Access My Requisitions**

Requisitions requiring action appear in an alert. They stay in an alert until they are received or cancelled. After a requisition is received, it is in the database, but not on your homepage. To see your requisitions, you may search for them. Choose the option, Requisition Search from your eSirius homepage. You are presented with a page of filters. Requisition search without filters chosen will display all of your requisitions regardless of their status.
Choose filters to narrow your search, if desired, and click Search. As an enterprise user, you can see only your own requisitions. You will be presented with a list of requisitions matching your search criteria.

You can select and view any requisition. The requisitions cannot be edited.

See Reports About My Requisitions

Animal Receipt Reports
From your home page, choose the option ‘Animal Receipt Reports’. You are presented with a page of available reports and filters to limit your search if desired.
Select a report, enter filters, and click ‘Run Selected Report’. As an enterprise user, you will see only your own orders/requisitions. The schedule of arriving animals, by default, displays orders/requisitions that have not yet been received. All other reports list ‘received’ orders/requisitions. Requisitions that have been cancelled will not display on reports.

**Requisition Reports (new for 10A)**
The following requisition reports have been added to eSirius in Release 10A. The filters are the same as those for Animal Receipt Reports (displayed above).

**Alerts – What Do They Mean and How Do I:**
Requisitions appear in an alert if they require action. Requisitions which have been cancelled or received do not appear in an alert. The alerts allow you to take necessary action or to follow the status of a requisition as it progresses through the workflow.
**Track a Submitted Requisition**

When you submit a requisition to the Animal Facility, it goes in the **Alert-New Animal Orders** with a workflow of Facility Supervisor. You and your staff members can see the requisition in that Alert. The Supervisor approves it based on space availability and the workflow changes to Animal Buyer. When the Animal Buyer receives a delivery date confirmation from the vendor, he ‘places’ the order. This puts it in the **Alert - Placed Orders** for the PI, and in the **Alert – Delivery Schedule** for the office staff.

**Standing Order Shipment**

When you created a standing order request, you specified the frequency of the shipments. The **Alert-Standing Orders Due** is triggered a preset number of days prior to each shipment, and the upcoming shipment displays there until the animal buyer accepts or cancels it.

Choose the order #/hyperlink to open the order.

**Standing orders due**  Washington, George  PI

Create New Animal Order > Order Line Detail

Enter all information pertinent to species, strains, age, weight, sex, etc.

**Order Info**

<table>
<thead>
<tr>
<th>Item</th>
<th>Delivery Date</th>
<th>Unit</th>
<th>Species/Line</th>
<th>Facility</th>
<th>Sex</th>
<th>Vendor Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/20/2023</td>
<td>S</td>
<td>C</td>
<td>Fischer</td>
<td>Mouse</td>
<td>Male</td>
<td>12345-6789</td>
</tr>
</tbody>
</table>

**Animal Source Info**

<table>
<thead>
<tr>
<th>Item</th>
<th>Vendor Purchases</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Vendor Info**
The animal buyer may accept the shipment, skip the shipment, or do nothing, by choosing ‘Cancel and Return to Home Page. If the shipment is accepted, it goes to the Alert-Delivery Schedule for office staff, and in the Alert-Placed Orders for the PI and his staff.

**Know If My Requisition was Waitlisted**

A vendor may be unable to deliver your animals on the date requested. In that case, the animal buyer will ‘wait-list’ the requisition in eSirius. The requisition moves from the Alert-New Animal Orders to the Alert – Waitlisted Orders. You receive an email notifying you the requisition was waitlisted, and you can see the alert on your eSirius homepage.

When the vendor notifies the animal buyer that the order will be shipped, the animal buyer will open the order from the Alert-Waitlisted Orders and enter the expected delivery date to process the order. It will move to the Alert-Placed Orders for the PI and Staff and to the Alert-Delivery Schedule for the Animal Office Staff. When the order is in the Alert-Waitlisted Orders, it displays on your homepage. You can open it by clicking on the Order#/hyperlink to view more detail, but the fields are all protected and not editable.

**Know When my Animals Have Arrived – and Where They Are**

An order confirmed for shipment by the vendor stays in your Alert-Placed Orders until it is ‘received’ in eSirius by the Animal Office staff. At that time, you get an email and the order moves to the ALERTS -- ORDERS RECEIVED WITHIN PAST 7 DAYS. The alert lists number of animals received and their housing location (building and room number). If the orders are “Call for PICKUP”, then this field will be empty.
See How Many Animals I Have Left

There are several ways to see how many animals remain on any protocol. One way is to choose the option Create a New Animal Order. You are presented with a list of your approved protocols – including the authorized number and balance of animals.

Create New Animal Order > List of Approved Protocol

<table>
<thead>
<tr>
<th>Select</th>
<th>Protocol #</th>
<th>Protocol Title</th>
<th>Species Name</th>
<th>Authorized #</th>
<th>Balance</th>
<th>Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2006-0001</td>
<td>Mouse protocol</td>
<td>Mice</td>
<td>5000</td>
<td>5000</td>
<td>09/30/2008</td>
</tr>
<tr>
<td></td>
<td>2006-0002</td>
<td>Text title for 9.5</td>
<td>Cats</td>
<td>500</td>
<td>497</td>
<td>10/02/2008</td>
</tr>
<tr>
<td></td>
<td>2006-0003</td>
<td>Text title for 9.5</td>
<td>Cats</td>
<td>500</td>
<td>496</td>
<td>11/01/2006</td>
</tr>
<tr>
<td></td>
<td>2006-0004</td>
<td>Test for drug report under asaac reports</td>
<td>Mice</td>
<td>5000</td>
<td>4924</td>
<td>08/12/2009</td>
</tr>
<tr>
<td></td>
<td>2006-0005</td>
<td>Test for drug report under asaac reports</td>
<td>Rats</td>
<td>500</td>
<td>416</td>
<td>08/15/2009</td>
</tr>
<tr>
<td></td>
<td>2006-0006</td>
<td>Test for adding personnel</td>
<td>Mice</td>
<td>5000</td>
<td>5000</td>
<td>07/25/2009</td>
</tr>
</tbody>
</table>

The protocol reports also display that information after you locate the protocol. See Reports About My Protocols

eSirius has a feature to notify you when you have received a preset percentage of animals. The Alert-Protocol Usage will display protocols when you have ordered 90% of the approved animals.

<table>
<thead>
<tr>
<th>Alerts -- Protocol Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protocol</td>
</tr>
<tr>
<td>----------</td>
</tr>
<tr>
<td>2006-0004</td>
</tr>
</tbody>
</table>

This alert is currently an information-only alert.