Welcome to TOPAZ Technologies

Welcome to TOPAZ Technologies. TOPAZ provides clinical research software solutions for the medical research industry. With more than 30 years in the industry, TOPAZ is an established leader delivering software solutions for regulatory environments, such as pharmaceutical companies, educational institutions, and research laboratories. Known for its protocol research software, TOPAZ has clients in the United States and Europe.

TOPAZ offers software solutions for compliance management for institutional ethics committees such as Institutional Animal Care and Use Committees (IACUCs), Institutional Review Boards (IRBs), and the Institutional BioSafety Committees (IBCs).

TOPAZ develops and organizes its products into suites of software products , represented as Elements of the complete TOPAZ solution. Currently available products include:

Animal Protocols

BioSafety Protocols

Human Protocols

Conflict Disclosures

Cost Accounting

Animal Orders

Animal Census

Animal Billing

Staff Training

Veterinary Management

Reporter

All products share a data storage system and present a consistent graphical interface to ensure cross-application collaboration.

Your return on investment is streamlined operation, increased productivity, and high-quality information with no integration costs. Backed by a solid product road map and world-class professional services, TOPAZ Technologies software products provide an ideal end-to-end solution as you work to succeed in research. You can be confident that our products meet your needs for regulatory compliance and much more.

TOPAZ Elements 3.3

Veterinary Management User Guide

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Resources and Support

Resources

For more information about TOPAZ Technologies applications refer to our built-in online help or contact Client Services at 512.249.8080.

Support

For all support issues your first line of defense should be your local facility resources, such as your facility's information technology (IT) department, administrators, core team members, and project managers. If the TOPAZ Elements software application issues persist, contact TOPAZ™ at support@topazti.com.

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Veterinary Management – Introduction

The TOPAZ Elements Veterinary Management application is designed to capture non-study data relating to animal health maintenance activities. These activities are typically necessary to achieve and maintain compliance with applicable regulations and policies, to ensure humane care for animals, and to ensure animals meet the needs of studies and teaching activities in which they participate.

Veterinary Management can be used by a variety of individuals responsible for providing medical care for animals, including veterinarians, technicians, and other support personnel. It also provides great flexibility for data input including automation systems, manual entry, and mobile methodologies. It also enables automation of veterinary care workflow processes, centrally managed tasks, and management of data more effectively through the use of templates.

Veterinary Management enables the following activity:

- **Create task forms** - A form builder is provided to create forms for identified animals (Animal Task Forms), unidentified animals (Cage Task Forms), and veterinary medical cases (Case Task Forms). These forms can then be used to record, view, and edit data about animals in your care.
- **Manage forms** - Forms can be activated or deactivated as needed.
- **Create task templates and grids** - Veterinary medical tasks can be defined using templates for basic activities, and can be further refined using task grids.
- **Create and manage cases** - Veterinary medical case records can be created and managed using case forms.
- **Schedule and edit tasks** - After task templates are defined, they can be used to schedule tasks on a one-time basis, or on a recurring basis as needed. Tasks can also be edited as workflow is refined.
- **Define and schedule work orders** - Tasks can be aggregated to create centrally managed work orders for multiple personnel and multiple tasks in any required permutation.
- **Improve individual and collective awareness** - Personnel can review their own tasks and work orders as well as those that are relevant but not assigned to them.
- **Monitor activity** - As tasks are completed and work orders proceed, progress can be monitored and fine-tuned as necessary.
- **Review Histories** - All recorded activities involving animals, both identified and unidentified, can be reviewed on demand.

Veterinary Management – UI Overview

To access the application, click the **Veterinary Management** link, located in the **Management** group on the TOPAZ Technologies home screen. This displays the Main screen for Veterinary Management, including five icons:

- **Setup**
- **Tasks**
- **Work Orders**
- **Perform Tasks**
- **Create Cases**
- **View Histories**

The application also provides a series of matching navigation tabs above the work space containing the icons. Place your cursor over an icon or tab to display available options for that feature. Refer to subsequent sections for option details.

Setup

The Setup Tasks feature enables the creation and management of forms, grids, and templates used to define and manage tasks. This feature supports eight activities:

- **System Settings** - Enable or disable
    - **Audit Trails** - System tracking of Veterinary Management actions.
    - **Task Assignments** - System tracking of tasks and to whom they are assigned.
- **E-Signatures** - Activate an E-Signature requirement for list of system defined events. If the event is activated, the application will display a pop-up dialog requiring an E-Signature of the user that triggered the event.
- **Manage Master Lists** - Manage master custom lists and master system lists. The application supports the following system lists:
    - **Case Types** - Types of cases that users can open.
    - **Dose Routes** - The method of drug deliver (subcutaneous, intramuscular, oculus dexter, etc.)
    - **Drugs** - Allowable drugs for prescription.
    - **Task Types** - Types of tasks that can be assigned.
    - **Task User Groups** - User groups that can be assigned tasks.
- **Create ID'd Animal Form** - Create task forms for identified animals. Animal forms contain additional field options related to the identity and status of the animal not available in the Non-ID'd form.
- **Create Non-ID'd Animal Form** - Create forms for the care and management of unidentified animals.
- **Create Case Form** - Create a form that can be used to capture veterinary medical case information for a specific animal.
- **Edit Form** - Edit and manage existing forms.
- **Create Task Templates** - Create templates that define tasks that may or may not include a task form or grid.

- **Edit Task Templates** - Edit and manage existing task templates.
- **Create Task Grids** - Create grids that allow tasks to be performed for multiple animals.
- **Create Work Order Templates** - Assemble a group of related task templates that will facilitate management of multiple tasks and provide a holistic context for medical activities.
- **Edit Task Grids** - Edit and Manage existing task grids.
- **Edit Work Order Templates** - Edit and manage existing work order templates.

NOTE: Forms that have been associated with data can be deactivated but may not be deleted.

Tasks

The Schedule Tasks feature allows the creation and scheduling of tasks. This feature supports four activities:

- **Create ID'd Animal Tasks** - Assign and schedule specific tasks for ID'd animals created from a task template to individuals and work groups.
- **Create Non-ID'd Animal Tasks** - Assign and schedule specific tasks for Non-ID'd animals created from a task template to individuals and work groups.
- **Edit ID'd Animal Tasks** - Edit assigned tasks for identified animals.
- **Edit Non-ID'd Animal Tasks** - Edit assigned tasks for non-identified animals.

Work Orders

- **Create ID'd Animal Work Orders** - Manage work flow for identified animals by creating work orders as new tasks are defined.
- **Create Non-ID'd Animal Work Orders** - Manage work flow for non-identified animals by creating work orders as new tasks are defined.
- **Edit ID'd Animal Work Orders** - Edit existing work orders for identified animals.
- **Edit Non-ID'd Animal Work Orders** - Edit existing work orders for non-identified animals.

Perform Tasks

Tasks are actions and procedures assigned to individuals using created task templates. This feature supports five activities:

- **Perform Scheduled Tasks** - Record actions and results for assigned tasks.
- **Perform Unscheduled Animal Task** - Record an observation for an animal without pre-scheduling.
- **Perform Unscheduled Cage Task** - Record an observation about a non-identified animal without pre-scheduling.
- **View Tasks** - View all tasks in the queue and drill down to find details such as status, assignments, and schedules.

Create Cases

Cases are records used to manage tasks associated with veterinary medical activities, such as examinations, diagnostic procedures, and treatments. This feature supports two activities:

- **Create Case** - Create a veterinary medical record for a single animal using a specific case record form.
- **Edit Cases** - Open and modify existing cases.

View Histories

The Histories feature displays animal history from receipt to termination. This feature supports three activities:

- **View Animal History** - View changes in identified animal status, health, and condition of any animal from receipt to current day.
- **View Non-ID'd Animal History** - View changes in unidentified animal status, health, and condition from date of receipt to current day.
- **View Cage History** - View cage location history, task history, etc.
- **View Animal Info Current** - Find specific animals to check basic animal information and edit status, health and condition for any animal.

The Auto-save Feature

Veterinary Management now has an Auto-save feature. When you make a change to any element, the system automatically saves the change when you navigate away from it. For this reason the **Save** button has been removed from all toolbars in every feature of the Veterinary Management module.

The only exception is when you use the preview feature in the form builder available in **Setup** without clicking elsewhere on the form. If you make a change and do not tab to the next item or click elsewhere on the form, your change is not saved and you will not see it on the preview. It will, however, keep your change intact; when you close the preview your change is still present and will be saved as soon as you interact with the form.

Veterinary Management – System Settings

Veterinary Management supports system settings that enable system behaviors to accommodate local administrative requirements:

- **Record Audit Trails** - Requires users to enter a reason for specific events and create a permanent record of it. Click the check box to activate this option.

Note: Turning Audit Trails on or off produces a pop-up dialog that requests a reason for the change in this setting.

- **Individual Task Assignments** - This setting gives administrators the option of hiding the Task User Group and Staff Members tabs in the Create Tasks feature. If the setting is checked (set), task creators can assign tasks to specified user groups or staff members. If it is unchecked (not set), it is not assigned to a specific group or individual. Anyone with access to the task can perform it. Access is determined by the task template.

  For example, if the task template is available to Groups A and B, but not to Group C, anyone in Groups A and B can see and perform a task created with that task template. Likewise, in the case of task templates in which individual staff members have been granted access, any of those individual can see and view tasks created using that task template.

  By default, this setting is checked (set), and specific groups or individual staff members must be assigned directly.

To access the System Settings feature, click the **Setup** tab at the top of the Veterinary Management main screen, and select the System Settings option.

Veterinary Management – Email Events

Email Events

The Email Events feature allows authorized personnel to determine whether e-mail messages will be generated for given circumstances and to customize the content contained in those messages.

An administrator chooses which events trigger an e-mail message and to whom. For example, if the administrator wants to notify the staff member who created the case when the case is closed, the administrator can specify

- The message content
- The recipient
- Whether the staff member who closed the case can review or edit any part of the content

What You See

When you select the **Email Events** option from the setup icon, that application present the Email Events selection panel containing the six types of events that can trigger the sending of an e-mail message:

- Case Opened
- Case Closed
- Task Published
- Task Started
- Task Closed
- Work Order Published

You can then select the e-mail properties such as allowing the staff member who committed the event trigger to edit the e-mail text before it is sent, and set the e-mail recipients.

Email Event Properties

The properties panel for email events presents two tabs:

- **Email Content** - Define the e-mail, including subject and content.
- **Email Recipient** - Define the recipient list.

Email Content Tab

The Email Content tab contains the following elements:

- **Active** - Activate or deactivate the event.
- **Allow Text Edit** - Specify whether the message can be edited prior to sending it. Selecting this check box makes the message content editable.
- **View Email Before Sending** - Specify that the message is to be viewed prior to sending it.

- **Allow Editing of Recipients** - Allow the staff member to modify the list of recipients prior to sending e-mail.
- **Subject** - Enter the e-mail subject.
- **Message** - Compose the email message.
- **Email Variables** - Choose variables such as Animal Info and Case Creator. Variables are pointers to specific information within the case, task, or work order. When you insert a variable it will be replaced by the value of that variable for that event type.

Email Recipients Tab

The Email Recipients tab contains the following elements:

- **Staff Recipients** - Add one or more staff names who are to received messages for the event.
- **Role-Based Recipients** -Add one or more message recipients based on their role.

It is possible to include both individual staff and role recipients to a message.

Creating an Email Message

Use the following procedure to create an email message to be triggered by a specified event:

1. Click the Setup tab at the top of the Veterinary Management home screen. The system displays a drop-down menu with all setup options.
2. Select the Email Events option. The system displays the Email events screen.
3. Select an event type and event in the Email Events panel. The application displays the events panel for the selected event type.
4. Click the permission check boxes to specify what you want to allow:
    - Allow Text Edit
    - Allow Recipient Edit
    - View Email Before Sending
5. Enter a subject in the Subject field.
6. Enter your message content, using any of the required Email Variables
7. Click the Email Recipients tab. The application displays the Staff Recipients and the Role-Based fields.
8. Enter a minimum of two characters in the Staff Recipients field and click the Role-Based Recipients to have the system retrieve existing staff members and positions. Select from the list of provided by the system.
9. Click the Email Content tab.
10. Click the Active check box.

Note: If any required information is missing or in some way invalid, for example a missing recipient list, the application presents a Validation Error dialog.

By default the Name field for the message will be populated with the name of the event. This name will also appear in the Subject field for the message, but can be edited as needed.

Text and variables can also be added to both Subject and Message fields. This is a powerful feature that allows you to create custom messages to meet local needs. Enter text as needed. Variables can be inserted at the point of the cursor when you click one of the available variables in the list to the right of the message field. Variables can be used as many times as needed.

Veterinary Management – E-Signature Events

The E-Signatures feature allows authorized personnel to determine whether an e-signature is required in order to complete an action for specific system-determined events.

Authorized personnel can access Veterinary Management e-signature settings by clicking the Setup icon in the Places group on the TOPAZ Elements main screen and selecting the E-Signatures option.

What You See

The E-Signatures feature displays a grid with four columns:

- **E-Signature Event** - The list of system defined events that can trigger an e-signature requirement.
- **Active** - A check box to activate the event, requiring an e-signature.
- **Display Name** - A text field used to enter an alternative name displayed in the e-signature dialog when it appears.
- **E-Signature Event** - A text field used to enter comments that will appear in the e-signature dialog when it appears.

Veterinary Management E-Signature Events

The system provides the following E-Signature events, which will trigger the requirement of an e-signature if event is set to Active:

- Case Closed
- Case Opened
- Task Canceled
- Task Completed
- Task Published
- Task Suspended
- Work Order Published

Activating Veterinary Management E-Signature Events

To activate the e-signature for an event, perform the following steps:

1. Click the Setup tab at the top of Veterinary Management home screen. The system displays a drop-down menu with all setup options.
2. Select **Email Events**.
3. Click the **Active** check box for the events you want to activate.
4. Enter an alternative name in the Display Name field, if needed.
5. Enter comments in the Description field, if needed.

Recording E-Signatures

When an event occurs that triggers an E-Signature, the application displays an E-Signature dialog and does not permit further progress until it is signed electronically. The dialog contains the following fields:

- **User ID** - Enter your user ID.
- **Password** - Enter your password.
- **Current Staff** - Displays the current user's name. Read only.
- **Current Date/Time** - Displays the current date and time
- **E-Signature Event** - The event that triggered the E-Signature. Read only.
- **Description** - Description provided in the Case, Task, or Work order.
- **Cancel** - Cancels the E-Signature.

When you enter your user ID and password, the application displays a Sign button to the left of the Cancel button. Click the sign button to complete the electronic signature.

Veterinary Management – Master List Management

Master lists determine which automated recording options are available to users. Some list settings are pre-determined by the system. Others (custom settings) are user-determined and can be created to meet local needs. Any of these settings can be made Active or Inactive, as needed, thus allowing for great flexibility in controlling the Veterinary Management process.

Authorized personnel can access master lists by clicking the Set Up icon on the main Veterinary Management page and selecting the Manage Master List Items menu option.

Audit Trails

Veterinary Management supports an optional Audit Trails feature that records transaction in a log. If the Audit Trails feature is turned on, making a change to a master list triggers a pop-up dialog that requests a reason for the change before continuing.

What You See

Choosing the **Manage Master Lists** option displays the master list panel, which contains two tabs:

- **System Lists** - Lists that are system-defined . Items can be added, but new lists are prohibited.
- **Custom Lists** - Lists that are user-defined. Additional lists are added here to tailor the application to your local needs.

Click a list to open the list items panel to the right. A quick find filter is located between the master list header and the master list items. This feature enables you to filter the an existing list to find the list of interest to you.

Click an item to open the properties panel on below the list items panel. Properties vary depending on the nature of the list. Additional items can be added as required.

Task User Groups, for example contains a list of all existing user groups. An **Add** button above the list to the left enables the addition of more groups. A remove button above the list and to the right removes a selected group. They can also be activated or deactivated by clicking the check box to the right of each user group. To edit the members of a user group select it on the list items panel. The application display the members in a properties panel (Members) below the list items panel.

Each master list contains properties that are relevant to the list.

Veterinary Management System Master Lists

The following master lists are system determined and do not display a properties panel when selected. Each of their options can be made active or inactive, as needed, but they cannot be deleted. None of these settings have predetermined list items; the list must be constructed after installation.

- **Case Type** - Options for Case Type must be added using the **Add** button in the left panel. Added options can be renamed, given a description, and made active or inactive in their respective properties panels. This list enables the creation of user case types that meet local needs.

- **Dose Route** - Dose Route is a master list that enables the specification of drug administration methods, such as intravenous, intramuscular, or subcutaneous administration. Options for Dose Route must be added using the **Add** button in the left panel. Added options can be renamed, given a description, and made active or inactive in their respective properties panels.
- **Drugs** - Options for Drugs must be added using the **Add** button in the left panel. Added options can be renamed, given a description, and made active or inactive in their respective properties panels. This allows users to create drug lists that conform local needs and regulations.
- **Task Types** - Options for Task Types must be added using the **Add** button in the left panel. Added options can be renamed, given a description, and made active or inactive in their respective properties panels. This is used to create custom task types that meet local needs and can be used for searching or grouping tasks on various grids in the system..
- **Task User Group** - Options for Task User Group must be added using the **Add** button in the left panel. Added options can be renamed, given a description, and made active or inactive in their respective properties panels. In addition, the properties panel for this settings options include a Staff selection field, This is used to create custom task user groups that meet local needs and is also used when assigning staff to perform tasks or to control access to task templates.

Master List Quick Find

When you click on a master list label, the application performs the following actions:

- Displays all items in the selected master list.
- Directs the quick find feature to enable searches for specific list items in that master list.

To find a list item, begin entering the item you want to view or edit. The application filters out all items that do not contain those characters as initial characters. In the case of items with more than one word, such as staff members, the quick find feature will accept the initial characters of any word in the string.

Adding Custom Lists

Veterinary Management also supports the addition of custom lists to tailor the application to your local environment. Perform the following procedure to add additional master lists:

1. Click the Setup tab at the top of the Veterinary Management home screen. The system displays a drop-down menu contain all setup options.
2. Select the **Manage Master Lists** options. The system navigates to the Manage Master Lists screen.
3. Click the Custom Lists tab.
4. Click the **Add** button above the list of custom lists. This action adds a New List item to the panel and opens a list items panel on the right.
5. Add the custom lists and activate them at will.

Adding Master List Items

Use the following procedure to add list items to any master list:

1. Click the **Add** button above the list of items on the list. The system selects the Active check box by default.
2. Enter a unique name of 50 characters or fewer in the Name field.
3. Enter a description in the Description field.
4. In the case of the Task User Group setting, add Staff to the group using the Staff selection field. Individual staff can be removed by clicking the minus **-** button associated with the staff member you want to remove.

Editing Master List Items

Use the following procedure to edit master list items:

1. Click the master list containing the item you want to edit. The application displays all the existing items in the list and populates the quick find search with the master list label (e.g. Task Types).
2. Enter all or part the item you want to edit. The application filters out all other items.
3. Click the item in the list panel you want to edit. This action displays existing properties for that list item.

Adding and Removing Staff in Task User Groups

When you edit the Task User Group list you can also add and remove staff members to and from the group. The application presents a panel labeled Staff, which includes a search bar and the list of all staff members assigned to that task. Use the following procedure to find and add staff members:

1. Enter at least two characters of the staff member's first or last name. The application will present all the names that match the characters you enter. As you enter additional characters the application will present fewer names. This feature enables the quick retrieval of only relevant names rather than all staff members at the entire facility.
2. Select the staff member you want to add. Click the **Add** button to add the staff member to the task user group. The list of added staff members for the task user group is located below the search bar.

To remove a staff member from the task user group click the minus **-** button next to the staff member's name.

Deleting Master List items

With the exception of predetermined (system) settings, administrators can delete items in the master list. Select an item and click the minus **-** button next to the item.

Veterinary Management – Creating Forms

TOPAZ Elements supports the creation and management of forms for a variety of purposes, including creating tasks and cases. Form creation is typically the first step in many of the workflow processes in which you are most likely involved. This section explains TOPAZ forms, how they are typically used, and how to create and edit them efficiently.

Introduction to Forms

TOPAZ forms are used in the same way as any traditional form: to collect and record information about a subject. For most organizations, forms are created during the implementation phase. The application is designed to provide organizations with the flexibility to create either universal or specialized form types.

Forms can be created, edited, or deleted and, once created, may either be active or inactive. Active forms are those that are used in production and inactive forms are those that have been removed from production or are still being developed.

The following section describes the forms used in TOPAZ Veterinary Management and the process for managing them.

Veterinary Management – Understanding Forms

Toolbar

The toolbar contains the features for managing the creation and editing forms. As you build each form use the toolbar buttons to perform tasks such as modify form structure, activate forms, and preview forms. The following features are supported:

- **New** - Leave the current form and create a new one.
- **Edit** - Edit an existing form.
- **Activate/Deactivate** - Put the form into or remove the form from production, depending on the current state. A form can only be edited in the active state.
- **Copy** - Make a copy of the existing form to create a new, similar form. Unlike previous versions, Veterinary management 2.7 provides a *deep copy*. This is an entirely new copy, which is completely independent of the original or other subsequent copies.
- **Expand** - View the entire form structure tree.
- **Collapse** - Collapse the form structure tree to the section level.
- **Hide/Show** - Hide or Show all question and option numbers, depending on the current state.
- **Delete Node** - Delete the selected section, question, or option.
- **Move Up** - Move the selected section, question, or option up in the form structure tree.
- **Move Down** - Move the selected section, question, or option down in the form structure tree.

- **Preview** - Preview the current form to see an approximation of the form's appearance.
- **Delete** - Delete the current form. The application dismisses the form, and removes accessibility to it.

Note: Forms can only be edited when they are in an inactive state.

Keyboard Accelerators

In the TOPAZ form builder, you are not limited to mouse navigation. You can navigate the entire form using your keyboard. In the EDITOR panel, for example you can navigate from one field to the next using the tab key. Likewise, in the FORM OUTLINE panel you can navigate from one section to the next using the up and down arrow keys.

An accelerator legend is available by striking the **?** key on your keyboard. To escape out of the legend strike the **Esc** key.

Header

The form builder provides four functions in a separator located to the right of the **Add Section** button.

- **FORM NAME** - A form name, which is assigned a default value by the application. You can change the name while the form is inactive.
- **Description** - An editable text field for describing the purpose of the form.
- **ID** - A unique, identifying number assigned by the application when it is created. When you click the create form item on the drop-down menu, the application creates a new, blank form and presents it on the form screen.
- **Active** - A non-editable check box indicating whether the form is active. New forms are always inactive, and the check box is presented unmarked. When you activate the form, the application displays a check mark in the box. If you deactivate the form, the application removes the check.

The FORM FIELDS Panel

The Questions Panel is located in the left side of the form screen directly below the **Add Section** button, and contains a list of questions. The set of questions are form dependent. For example, less information is purposely tracked on non-ID'd nimals than on ID'd Animals. Fewer questions are therefore available for a Non-ID'd Animal Form than an ID'd Animal form.Build forms tailored to your local need by selecting a section and clicking the add (**+**) button next to the question you want to add to that question.

ADD SECTION Button

The **Add Section** button is located directly below the toolbar on the left. The purpose of a section is to contain questions, and questions can be added only to existing sections. Click the **Add Section** button to add a section

The application adds a new section and assigns it a sequential integer beginning with 1, incremented by 1 with each subsequent section. Section 1 is always at the top of the tree followed by Section 2 directly below it.

If you move a section up or down in the form structure tree using one of the Move buttons, the sections will be renumbered in alignment with their order in the tree.

Questions

TOPAZ Questions are not questions in the grammatical sense. They host data of a certain type, and are called questions because they represent information requested by the form creator, which are answered by form user.

Each section can contain user-defined questions and system questions and related to the section topic. In TOPAZ Elements, a system question is one that has a specific meaning and format.

An example of a system question is **Animal Information**. This question requires specific information recorded in a specific format, and is thus treated differently in the database than a user defined question such as a **Date** field. Unlike the **Animal Information**, field the date field can be used in any way the administrator deems appropriate. System questions are visually highlighted, and can only be used one time on any given form, whereas user defined questions can be used as many times as necessary in the form.

Several question formats are supported and are designed to support various types of answers such as fill-in-the-blank, and multiple choice from drop-down lists.

Important: You can enter individual system questions only one time on a given form. The system disables the add button for any system question after you enter it.

Questions can be added only to a section or an option. To add a question, click the section or option you want to contain the question. If the section or option has one or more questions in it, the question will be added to the bottom of the section or option.

Like sections, questions are automatically numbered. The number takes the form *X.Y*, where *X* is the section number and *Y* is a sequential integer beginning with 1 incremented by 1 with each subsequent question. You can move individual questions up and down within the section using the **Move** buttons, and the system will automatically renumber them so that *X*.1 is always at the top of the section.

The form builder does have an option for inserting a question in between the top and bottom of the section. If you click an existing question it will be added directly below the selected question.

Child Questions

Veterinary Management supports the concept of child questions for certain types of fields. These are questions nested within existing questions. The following fields are hierarchical by design and support child questions:

- **Multi-Option** - This type of field enables a question with multiple possible answers that are not part of a list defined by the system or an administrator. For example, if the task is a hygienic task, you might be required to examine the animal and decide what is needed. In such a case the form creator might offer
    - Bathing
    - Teeth cleaning
    - Nail trimming

  A Multi-Option question enables the selection any or all of those options.
- **Single-Option** - This type of field is for questions that allow only one response from a list of two or more. For example, if your task is to report on the behavioral condition of the animal options such as
    - Typical
    - Agitated

  - Lethargic
  - Other

  In this case the question would only permit one response.

- **Multi-Select** - This type of field is similar in concept to Multi-Option but used for questions with multiple possible answers that are part of a list defined by the system or an administrator. A typical example would be a list of drugs of which you must select all the drugs you administered to an animal:
  - Drug A
  - Drug B
  - Drug C

  Depending on why you're treating the animal and the current protocol, you might be limited to only one of those drugs or you might have a requirement to administer more than one. Multi-Select questions give you that option.

These questions can all contain child questions, which can also contain other child questions. It is possible, for example, for the form creator to provide a Multi-Option question in which one of the options has a child that is also a Multi-Option question. In such a case, the form asserts the child question, nested within the parent so that you have the opportunity to answer it.

To add a child question, click the intended parent and then add the child question by clicking the add (**+**) button associated with it. The application automatically numbers child questions using the format *X.Y.Z*, where *X* is the section number, *Y*, the parent question number, and *Z* is a sequential integer beginning with 1, incremented by 1 with each subsequent child question. Child questions of child questions use the same numbering system with an additional decimal point and digit for each subsequent generation.

Like sections and questions, you can move child questions up and down in the section using the **Move** buttons. The system will automatically renumber the child questions just as it does with sections and questions.

The FORM OUTLINE Panel

The form panel is located to the right of the Questions Panel. You build a form by adding sections and then adding questions to those sections. The form is intended to capture administrative, statistical, regarding animals. When the form is complete, it becomes a source of information about an animal and the care that it receives.

The EDITOR Panel

When you select a section or question, the application displays details in the EDITOR panel. You can then edit data for that question or section by clicking on the editable field in the EDITOR panel.

Veterinary Management – Sections and Questions

TOPAZ Elements supports several form features that make form building easy and flexible. It also offers a pre-defined set of questions to facilitate your existing work flow processes.

Section and Question Controls

- **Up and Down arrows** - Move the section or question up or down in the outline tree.
- **Trash can** - Delete node (section or question).
- **Add Question Attachments** - Enables the requester and the form designer to add attachments. Click the paperclip link to display the Add Links and Attachments dialog box. The dialog presents three options:
  - **Esig** - Requires the user to provide an e-signature at submission (questions only).
  - **Required** - Requires the user to enter a response to a question (questions only).
  - **Description** - Use this text field to provide details about the question and kinds of answers that are expected (questions only).
- **Help** - Enables users to view annotations about a section or question. Click the link and enter supplemental information in the help field.
- **Add Option** - Add the required options to Single Option and Multi Option questions.
- **Custom List** - Add the required custom list to Single Select and Multi Select questions.

Note: The maximum attachment size is specified in the Web configuration file (web.config). See your administrator for details.

Supported Questions

This section presents the pre-defined questions provided by TOPAZ Elements Veterinary Management. Which of these questions is displayed will depend on the type of form selected (ID'd Animal, Non-ID'd Animal, or Case). User-defined fields can be included at the discretion of the administrator in whatever way and format is deemed appropriate when the form is created.

Some questions are read only, and as such are populated by the system. Questions that are read/write have a **Required** option in the form of a labeled check box, located in the Editor panel. Check this box to require the user to provide an answer.

Animal Information - This field is read only and is only for animal forms. The purpose of the field is to ensure that those performing a certain task on a specific animal can verify that the animal and form match. it contains the following data:

- Species
- Strain/Stock/Breed
- Gender
- Alternate IDs
- Protocol
- Animal Owner
- Principal Investigator
- Location

Animal Status – This field is only for animal forms. The purpose of the field is to allow those performing a task to view and edit the status of an animal as appropriate. This question displays an **Animal Status** button. When you click this button, the application displays a list of statuses from which to choose. Selecting a status updates Animal Census without the requirement of leaving Veterinary Management. The task displays the status next to the **Animal Status** button.

Body Weights – This field enables the recording of the weight of ID'd Animals. Values must be positive numerals with a maximum of seven before the decimal point and two following the decimal place (i.e. xxxxxxx.yy). Units of measure cannot be specified in the field.

Cage Information – This field is read only for Non-ID'd Animal forms. It contains the following data:

- Cage Identifier
- # Animals
- Gender
- Species
- Strain/Stock/Breed
- Protocol Number
- Animal Owner
- Principal Investigator
- Location

Case Number – This is a read-only field for animal cases. It is a system generated field that displays any cases that exist for the animal.

Date – This field provides a calendar button on the form so that staff preparing the form can enter a date.

Multi Option – This field enables the creation of options on the form in which items are ***not*** mutually exclusive. You could for example, populate the form with several different complementary procedures any of which could be selected.

Multi-Select – This field enables you to choose from a set of custom lists in which items are **not** mutually exclusive. The lists are created by administrators and selected by staff from a drop-down list.

Numeric – This field enables the specification of a numeric only text field on the form.

Plain Text – This field enables text entry that cannot be formatted.

Rich Text – This field enables text that can be formatted with font treatments and can include hyperlinks and symbols. It also has a spell check feature.

Recorded Date and Time – This field records the date and time that task data was actually captured regardless of when it is entered. Using this field, data can be captured on schedule and recorded later, allowing for operational flexibility.

Related Tasks – This field is only for case forms and enables the recording of tasks that are associated with the case. In some cases, tasks are related to other tasks. For example, a clinical case with an animal might have associated diagnostic tasks such as antibiotic injections.

Single Option – This field enables the creation of options on the form in which items ***are*** mutually exclusive. You could for example, populate the form with several different complementary procedures only one of which could be selected.

Single Select - This field enables you to choose from a set of custom lists on the form in which items ***are*** mutually exclusive. The lists are created by administrators and selected by staff from a drop-down list.

Stress Level - This field enables recording a severity grade for the animal if that is appropriate or necessary.

Table - This field enables the creation of a table in which staff members can enter multiple arrays of data. Set the number and names of columns when setting up the form, and users can enter as many rows as needed, one at a time.

Task Info - This field is read only and lists the following requisite information:

- Task name
- Scheduled date and time
- Task description
- Task instructions
- Name of staff member who performed the task
- Task date and time when the task is saved

Task Requester - In the event that clarification of a task or reporting something about the task is required, contact information about the requester is needed. The following information is available on the Task Requestor field:

- Staff member name
- Phone number
- e-mail address

This field is read only.

Termination Date - This question is for recording the date of animal termination. This question displays a **Terminate Animal** button. When the form users click this button, the application displays a date field with a calendar assistant from which they can select a date. Selecting a date updates Animal Census without the requirement of leaving Veterinary Management. The task displays the termination date next to the **Terminate Animal** button.

Veterinary Management – Creating Forms

Veterinary Management provides a Form Builder to enable you to create a form tailored to your workflow processes. When you launch the form builder, the Form Panel initially is empty; there are no questions on the form. Questions are available in the Fields Panel and dragged onto the Form Panel in the inactive state. When the form is complete, you can activate it at the appropriate time to make it available to requesters.

Use the following procedure to create a form:

1. Place the cursor over the **Setup Tasks** icon to open the drop-down menu. Select the Create Task Forms option. The application provides three options for creating new forms: **Create ID'd Animal Form**, **Create Non-ID'd Animal Form** and **Create Case Form**. Click the type of form you want to create.
    1. Click the **Form Name** field and replace the default form name with a name of your choosing.
2. Click the **Description** and enter a description.
3. Click the **Add Section** button located on the Form Fields panel on the left. The application adds a section to the form panel.

4. Click the section you just created to indicate you want to populate that section.
5. Click questions from the Questions Panel. The application populates the selected section with your questions. Enter the requisite information about the question you just added:
   a. Replace the default name with a name of your choosing.
   b. Click **Esig** if you want to require an e-signature.
   c. Click **Required** if you want to require an answer to this question.
   d. Enter a description in the Description field.
   e. Enter help text in the Help field.
6. Repeat this process until the section is complete. You then have the option adding additional sections. If additional sections are required return to step 4. If not, proceed to step 8.
7. Select the **Activate** check box when you are ready to make the form available to requesters.

Veterinary Management – Viewing and Editing Forms

TOPAZ Elements supports the concept of active and inactive forms. To edit a form it must be inactive. Therefore to edit an active form, you must first deactivate it.

Use the following procedure to open a form:

1. Place the cursor over the Setup Tasks icon on the Veterinary Management Main page.
2. Click the type of form you want to edit (ID'd Animal, Non-ID'd Animal, Case) in the pop-up menu that appears. The system navigates to the form builder.
3. Click the **Edit** button in the tool bar. The application displays the list of existing forms of the type you chose.
4. Click the form you want to edit.
5. Make the required edits.

All changes are automatically saved when you change fields or navigate away from the current form.

Working with Specialty Questions

Some of the supported questions require unique procedures to complete. This section describes how to build and complete them.

Single-Option and Multi-Option Questions

Use the following procedure to construct Single and Multi-Option questions;

1. Click the section to contain the question. The application highlights the section indicating it is active.
2. Click the question.
3. Replace the default name with a name of your choosing.
4. Click **ESIG** if you want to require an e-signature.
5. Click **REQUIRED** if you want to require an answer to this question.
6. Enter a description in the DESCRIPTION field.
7. Enter help text in the HELP field.

8. Click the **Add Option** button.
9. Replace the default name with a name of your choosing.
10. Click the **Selected** checkbox if you want this option to default to Selected.
11. Enter a message in the Alert Text field to communicate important information to the form user about this option. e.g. "Selecting this option is not recommended if the animal has been recently vaccinated."
12. Repeat steps 8 through 11 until you have completed all options.

Single-Select and Multi-Select questions

Use the following procedure construct a Single-Select and Multi-Select questions.

1. Click the section to contain the question.
2. Click the question.
3. Replace the default name with a name of your choosing.
4. Click the ESIG checkbox to require an e-signature.
5. Click the REQUIRED checkbox to require an answer to this question.
6. Enter a description in the DESCRIPTION field.
7. Enter help text in the HELP field.
8. Click a custom list from the **CUSTOM LIST** drop-down menu (down arrow on the right of the button).
9. Click the required list.

Form Tables

Use the following procedure to construct a form table:

1. Click the section you want to contain the table.
2. Click the Table question.
3. Replace the default name with a name of your choosing.
4. Click the Esig check box to require an e-signature (optional).
5. Click the Required check box to require an answer to this question (optional).
6. Click the paperclip glyph in the Files box to add any required attachments (optional).
7. Click the Allow Requester to Add Attachments check box to enable attachments from the form user (optional).
8. Enter a description in the Description field.
9. Enter help text in the Help field.
10. Complete the information in Define the Table Layout:
    a. Enter the column name in the Column Name field.
    b. Enter the column width in the Width field.
    c. Select Plain Text or Custom List in the Type field. If you select Custom List, the application displays a Custom List field.
    d. Select a custom list from the Custom List drop-down menu.

e. Click the add column (**+**) button. The application adds a the column you specified to the table.
f. Repeat steps a through e until the table is complete.

Veterinary Management – Create Task Templates

Veterinary Management task templates are used to create detailed properties that define specific actions to be taken by designated personnel. Task templates can be further enhanced through the use of task forms or task grids, which can be used to define what data will be collected when a task is actually performed.

Accessing Create Task Templates

Place the cursor on the **Setup Tasks** icon on the Veterinary Management main page and select the **Create Task Templates** option to open the Create Task Templates screen.

What You See

The Create Task Templates main screen contains the following elements:

- **Toolbar** - Contains the following buttons:
  - **New** - Create an entirely new task template.
  - **Edit** - Edit an existing task template.
  - **Activate** - Make the current task template available to staff.
  - **Delete** - Delete the current task template.
- **Active/Not Active** label - Signifies whether the task template is available to create scheduled tasks.
- **Task Template** - A text field used to name the task template. Task template names must be unique and are limited to 50 characters.
- **Send Email** check box - Sends e-mail notification upon completion of the task.
- **Require E-Signature** check box - Requires an e-signature upon completion of the task.
- **Use Sample IDs** - Causes the system to generate a unique number for each animal on the task so that data generated from analyzers can be matched back to a task assigned to an animal.
- **Animal Type** - A drop-down list that determines whether the task template is associated with an animal or a cage.
- **Task Type** - A pop-up list that determines which task type (created by a system administrator) will be assigned to the task scheduled using the task template.
- **Entry Type** - A drop-down list that determines how data will be collected for tasks using the task template. Three entry types are supported:
  - **Status Entry** - Status entries are typically assigned for a single action such as administering a drug. In such case cases, after the task has been performed you update the status entry to indicate that the task has been performed.
  - **Form Entry** - Form entries are for more complex tasks that can involve multiple procedures and interactions with an animal. In the case of a form entry, the person assigned to the task answers questions related to the task being performed.
  - **Grid Entry** - Grid entries are tables comprising rows of animals and columns of tasks to be performed. Grids are typically used for gathering information like weight or animal condition.

- **Task Form** - A pop-up list that determines which form will be used upon selection of either Form or Grid as the Entry Type.
- **Description** - A text field used to describe the nature of the task. This field is limited to 1333 characters.

  Note: Entering a description in this field is highly recommended.

- **Instructions** - A text field used to provide necessary instructions for treatment.
- **Access** tab - A tab for defining who has access to the task template. The implication of access is not limited to who can use it to create tasks. It is also determines who has access to tasks created from the task template. The administrator has the option of determining whether tasks can be assigned to specified user groups and staff, or made generally available to all user groups staff members who have access to the template.

  Access to the template is granted using two panels on the access tab:

  - **Task User Groups** - User groups who you want to allow access to the template when creating tasks.
  - **Staff Members** - Staff members who you want to allow access to the template.
- **Default Assignments** tab - A tab used to assign default user groups and staff members to a task when it is created, containing the following panels.
  - **Task User Groups** - User groups who you want to allow access to the template when creating tasks.
  - **Staff** - Staff members who you want to allow access to the template.

Creating a New Task Template

If an existing template is already open, click the **New** button in the toolbar and begin the following procedure at step 2; otherwise proceed from step 1:

1. Place the cursor over the Setup Tasks icon on the Veterinary Management Main screen and select the **Create Task Templates** option to open the Create Task Templates screen.
2. Enter a unique name in the **Task Template** field.
3. Click the **Send Email** check box to send an e-mail notification when the task is complete.
4. Click the **E-Signature** check box to require an e-signature.
5. Click the **Use Sample IDs** check box to have the system assign an ID to tasks created using this templates.
6. Click the **Animal Type** radio button, either **Identified** or **Nonidentified** animal.
7. Click the **Task Type** drop-down button and choose an option from the list that appears.
8. Click the **Entry Type** drop-down button and select Status Entry, Form Entry, or Grid Entry. This will determine what information will be included when a task is performed:
   - **Status Entry** - Choosing this option will allow users to record task completion and comments.
   - **Form Entry** - Choosing this option will include additional information that is part of a selected task form.
   - **Grid Entry** - Choosing this option will include additional information that is part of a selected task grid.

6. Enter appropriate details in the **Description** text field including instructions.
7. Enter Instructions in the **Instruction** field.
8. Using the Access tab, make the task template available to user groups:
   a. Click the **Add** button on the Task User Groups field.
   b. Select the appropriate user groups.
9. Make the task template available to individual staff members:
   a. Click the **Add** button on the Staff field.
   b. Select the appropriate members.
10. Click the Default Assignments tab.
11. Select the user groups and staff members by clicking in the field and entering the name of each. The application will assist you with suggestions using the dynamic filter feature.

Editing an Existing Task Template

1. Select **Edit Task Templates** from the Setup Tasks menu on the main screen. The application displays the Task Template selection grid.
2. Select the template you want to edit.

NOTE: If changes are made to a previously used Task Template, the system will automatically apply version control, to maintain data integrity.

Veterinary Management – Create Task Grids

Veterinary Management task grids are used to enhance task templates by further defining what data will be collected when a task is actually performed.

To access the Create Task Grids feature, place the cursor on the **Setup** icon on the Veterinary Management main page and select the **Create Task Grids** option. This opens the Define Task Grids main screen.

What You See

The Create Task Grids main screen contains the following elements:

- **Toolbar** - Containing the following buttons:
  - **New**
  - **Edit**
  - **Activate**
  - **Delete**
- **Grid Name** - A text field used to name the task grid. Task grid names must be unique to be saved. Task grid names are limited to 50 characters.
- **Animal Type** - A drop-down list that determines whether the task grid is associated with an animal or a cage.
- **Status** - A read-only field that displays the status of the current task grid.
- **Column Name** - A field for entering the column name.
- **Column Entry Required?** - A check box that requires the column to contain a value.
- **Column Type** - A field that enables the specification of the data format.
- **Add** - A button used to add a column to the task grid. The button only appears when you select a column type from the drop-down list.
- **Task Grid Preview panel** - A panel that is populated by the application as columns are added to the grid.

Creating a New Task Grid

If an existing grid is already open, click the **New** button in the toolbar and begin with step 3, otherwise proceed with step 1:

1. To access the Create Task Grids feature, place the cursor on the **Setup** icon on the Veterinary Management main page.
2. Select the **Create Task Grids** option. This opens the Define Task Grids main screen..
3. Type a name in the Grid Name field. Task grid names must be unique to be saved. Task grid names are limited to 50 characters.
4. Click the **Animal Type** drop-down button.
5. Select either ID'd Animal or Non ID'd Animal.

6. Click the Activate button if the template is to be available for use. The application will toggle the **Activate** button to **Deactivate**.
7. Enter a column name in the Column Name Field.
8. Choose a column type from the **Column Type** drop-down menu. The application displays an **Add** button to add the column after you specify the necessary column values.
9. Complete additional fields, such as **Default Value** if they are present.
10. Click the **Add** button. This action adds the column to the Task Grid Preview panel.
11. Continue adding column definitions until the grid is complete.

NOTE: Columns added to the grid can be reordered and deleted.

Column Types

The following column types can be added to a task grid. Each column type requires a unique name and an indication whether data entered is required or not.

- **Bodyweight** - Displays a column used for recording weight of an ID'd Animal. This column type can only be used once for each task grid.
- **Numeric** - Displays a Default Value field.
- **Plain Text** - Displays a Default Value field.
- **Recorded Time** - Displays a Time and Date stamp calendar. This column type can only be used once for each task grid.
- **Pain Category** - Displays a severity grade drop-down field created by a system administrator. This column type can only be used once for each task grid.
- **Custom List** - Displays a Custom List drop-down field and a Default Value field created by an administrator.
- **Termination Date** - Displays a calendar tool for selecting the termination date. This column type can only be used once for each task grid.

Editing an Existing Task Grid

If an existing grid is already open, click the **Edit** button in the toolbar and begin with step 3, otherwise proceed with step 1:

1. Place the cursor on the **Setup** icon on the Veterinary Management main page and select the **Edit Task Grids** option. This opens the Define Task Grids main screen.
2. Click the **Edit** button in the toolbar. The application displays the Task Grid selection grid.
3. Select the grid you want to edit.
4. Make required changes. These can include removing columns, and changing column order.

Veterinary Management – Create Work Order Templates

Work order templates can be used to aggregate and better manage multiple task templates and are particularly useful to set up templates for multiple related tasks, such as treatment plans.

Accessing Define Work Order Templates

Place the cursor on the **Setup Tasks** icon on the Veterinary Management main page and select the **Create Work Order Templates** option to open the Create Work Order Templates screen.

What You See

The Create Work Order Templates dialog box contains the following elements:

- **Toolbar** - Containing **Save**, **New**, and **Edit** buttons.
- **Template Name** - A text field used to name the work order template. Work order template names must be unique to be saved. Work order template names are limited to 50 characters.
- **Active** check box - Determines whether the work order template is available for use.
- **Target Type** - A drop-down list that determines whether the task template is associated with an animal or a cage.
- **Add Task Templates** button - A button that allows users to add multiple task templates to the work order template.
- **User Groups with access to Task** - A selection field used to associate the work order template. This feature controls who can use the template to schedule a work order.
- **Staff with access to Task** - A selection field used to associate the work order template. This feature controls who can use the template to schedule a work order.

Creating A Work Order Template

1. Enter a name in the **Template Name** field. This must be a unique name that has not been used before.
2. Place a mark in the **Active** check box if the template is to be available for use. If a template is currently active then removing the mark will place it in an inactive state.

NOTE: Once a template has been used to collect data it may be inactivated but it may not be deleted.

3. Click the **Target Type** drop-down button and choose either **Animals** or **Cages**. This will determine whether the template relates to identified or non-identified animals. Once a target type has been chosen, the **Add** button becomes active for the Add Task Templates to the Work Order Template field.
4. Click this button to open the Select Task Template selection grid.

5. Select the appropriate task templates and click the **OK** button. This will close the Select Task Template selection grid and display the selected task templates in the Task Templates area.
6. Click the green **Plus** button on the User Groups with Access to Templates add user groups. The application displays a pop-up dialog with available groups.
7. Select the groups you want to add.
8. Click **OK**. The application populates the panel with your selected groups. Groups that have been added to the panel can be removed by clicking their red **Minus** button.

NOTE: Assigned groups are those individuals who can use the template to create work orders - not those will be assigned to perform scheduled tasks.

9. Click the green **Plus** button on the Staff with Access to Template panel. The application presents the Select Staff selection grid.
10. Select one or more individuals from the grid.
11. Click the **OK** button. The application adds the selected individuals to the Staff with Access to Template panel. Individuals that have been chosen can be deselected by clicking their red **Minus** button. When choices are complete.

NOTE: Assigned staff are those who can use the template to create scheduled tasks - not those will be assigned to perform the scheduled task.

12. When all desired changes have been made, click the **Save** button in the toolbar to save the template.

NOTE: if changes have been made to an existing template and if audit trailing is active for this feature it may be necessary to complete an audit trail dialog.

Editing an Existing Work Order Template

If you are at the Create Work Order Templates screen proceed to step 2, otherwise use the following procedure beginning at step 1:

1. Place your cursor over the **Setup Tasks** icon and select the **Edit Work Order Templates** option. The application displays the Select Work Order Template selection grid. Proceed with step 3.
2. Click the **Edit** button in the toolbar to open the Select Work Order Template selection grid.
3. Select the template you want to edit. The application opens the selected work order template.
4. Make the required changes
5. Click **Save**.

   NOTE: If changes are made to a previously used template, the system will automatically apply version control, to maintain data integrity.

Veterinary Management – Creating and Managing Tasks

A task is an item assigned to a user group or staff member that requires an action.To assign a task, you must schedule it using the Create Tasks feature.

TOPAZ offers two types of tasks:

- Animal Tasks - Tasks pertaining to ID'd Animals.
- Cage Tasks - Tasks pertaining to groups of Non-ID'd animals for a specified cage.

Use the following procedure to access the Create Tasks feature:

1. Click the **Tasks** icon on the Veterinary Management Main screen.
2. Select either the **Create ID'd Animal Tasks** or **Create Non-ID'd Animal Tasks** option. This action opens a selection grid containing all available animals for the class you have chosen (ID'd or Non-ID'd)
3. Select the animals that require a task.
4. Click **OK**. The Application displays the content of the Add Animals tab.

What You See

The Create Tasks and Edit Tasks screens contain elements that enable access to several features described in the following sections.

Toolbar

- **New** - Use this button open a new task.
- **Edit** - Use this button to edit a task.
- **Publish** - Use this button to publish the task and make it available to production for action. The Publish button is replaced with an Unpublish button when you publish the task.
- **Delete** - Use this button to delete a task.

After a task has been promoted to Started, two additional buttons are added to the toolbar in the Edit Task

- **Suspend** - Temporarily halt the task. When you suspend a task the Suspend button is hidden on the Edit Tasks page. To unsuspend a task, go to the Perform Scheduled Tasks page.
- **Cancel** - Cancel the task permanently.

Note: After a task is canceled the status cannot be changed.

Header

- **Task Name** - The name of the task, initially assigned by the application. The name is editable in the **Define Task** tab.
- **Work Order** - The work order ID if the task is part of a work order.
- **Status:** - The current task status, which is one of the following:
  - **Draft** - The task is unpublished.
  - **Published** - The task is in production.
  - **Started** - The task is being executed.
  - **Suspended** - The task has been temporarily halted.
  - **Canceled** - The task is no longer available to perform. When you select a Perform Task option, it is not part of the list of tasks on the Select Task dialog displayed by the application.
  - **Completed** - The task has been accomplished.

Select Animals Tab

This tab contains

- **Add Animals** button - Add one or more animals or cages to the task. Details for selected animals or cages are displayed as they are added to the grid.
- **Remove Animals** button - Remove one or more animals or cages from the task. Details for selected animals or cages are displayed as they are added to the grid.
- Animals display grid or a cages display grid depending on the type of animal (ID'd or Non-ID'd) that was selected.

Define Task Tab

The application defaults to this tab, which contains the following fields and buttons:

- **Task Name** - Displays the task name by default but which can be used to give the task a unique name.
- **Priority** - Designate whether the task is to be high priority or not.
- **Schedule Date/Time** - Enter the start date and time in these two fields to indicate when the task is scheduled to begin.
- **Task Template** - Select the task template you want to use for the current task.
- Staff Account - Enter a staff account to which the task will be billed.
- **Description** - Enter a description of the task. Text included as part of the template is displayed by default.
- **Instructions** - Enter instructions for the task. Text included as part of the template is displayed by default.
- **Comments** - Enter comments about the task.
- **Requester** - Automatically displays the requester ID. The requester is the staff member who commissions the task, which may differ from the individual who schedules the task. By default this field is populated with the Creator ID but can be changed. This row also includes a**Staff Info** button that can be used to display additional information about the requester.

- **Creator** - Automatically displays the task creator ID, and is read only. This row also includes a**Staff Info** button that can be used to display additional information about the creator.

  A system administrator has the option of allowing tasks to be assigned directly to user groups and staff members, or to be assigned to everyone with access to the task template used to create the task. If the administrator has not set the option to assign tasks user groups to user groups and staff members, the previously described controls are all that are available to you.

  If the administrator has set the option for directly assigning specifed groups and staff members to tasks the following to panels are also available and groups or individuals must be assigned to the task prior to publishing it:

- **Task User Groups** - Assign existing user groups to this task. Perform a search by typing part ot the user group name in the field and click the Add button to the right of the field to add the selected user group.
- **Staff Members** - Assign existing staff members to this task. Perform a search by typing part of the member's name in the field and click the Add button to the right of the field to add the selected member.

Scheduling a New Task

1. Access the **Create Tasks** feature. The application defaults to the Assign Animals or the Assign Cages tab of this feature.
2. Select the animals for the task you want to define.
3. Click the **Define Task** tab. The application navigates to that tab.
4. Enter a new name in the **Task Name** field.
5. Place a mark in the **High Priority** check box if the task has a high priority. Such tasks are not treated differently by the application. The assigned staff merely receive an indicator notifying them that this task is more urgent than other tasks without this indicator.
6. Select a date and time for the **Schedule Date/Time** field.
7. Enter part of the template name (at least one character) in the TASK TEMPLATE field. The application presents a drop-down list of template names that match the character string you entered.
8. Select the appropriate template.
9. Enter part of the Staff Account (at least two characters) in the Staff Account field. The application presents a drop-down list of accounts that match the character string you entered.
10. Select the appropriate account.
11. Enter necessary details in the **Description** field.
12. Enter necessary details in the **Instructions** field.
13. Enter necessary details in the **Comments** field.
14. Select a new requester if necessary. If specified user groups or staff members should be directly assigned to the task, continue to step 13. If not, continue to step 14.
15. Add one or more groups and/or staff members using the **Add** button for each.
16. Click the **Publish Task** button to allow assigned staff to view and perform the task.

Editing a Scheduled Task

Use the following procedure to edit an existing task:

1. Click the Tasks icon.
2. Select the ID'd Animal Tasks or the Non-ID'd Animal Tasks option. The application displays the Select Task grid dialog.
3. Click a task to open it in the Edit Task screen.
4. Perform necessary edits to the task.

Important:You can edit tasks regardless of the task status, with one exception: You cannot select a different task template after you have changed the task to Started.

Un-Publishing a Scheduled Task

A task that has been previously published can be un-published. To un-publish an existing published task:

1. Open the task in the **Edit Scheduled Task** screen. The **Publish** button in the toolbar should be inactive and the **Un-Publish** button should be active.
2. Click the **Un-Publish** button. The **Un-Publish** button will become inactive and the **Publish** buttons become active. It is possible to toggle back and forth between the two states as desired. NOTE:Un-publishing a task will remove the acceptance or rejection set by any of the assigned staff who may have already looked at the task.

Veterinary Management – Schedule Work Orders

A work order enables the scheduling of multiple tasks, which are typically related to each other, such as administering a medication to an animal multiple times and following each with an observation. Within the work order you can schedule both recurring and non-recurring tasks using existing task templates.

TOPAZ offers two types of Work Orders:

- ID'd Animal Work Orders - Work orders pertaining to ID'd Animals.
- Non-ID'd Animal Work Orders - Work orders pertaining to groups of Non-ID'd animals for a specified cage.

Use the following procedure to access the Create New Work Orders feature:

1. Click the **Work Orders** icon on the Veterinary Management Main screen and select either the **Create ID'd Animal Work Order** or **Create Non-ID'd Animals Work Order** option. This action opens a selection grid containing all available animals.
2. Select the animals for which you want to create work orders.
3. Click **OK**. The Application displays the content of the Select Animals tab of the Create Work Orders feature.

What You See

The Create Work Orders screen contains elements that enable access to several features described in the following sections.

Toolbar

- **New** - Use this button to leave the current work order create a new one.
- **Edit** - Use this button to open and view or edit an existing work order.
- **Copy** - Use this button to copy the current work order.
- **Publish/Unpublish** - The application displays this button after a task is added to the work order. Initially this button is hidden from view. Use this button to allow assigned staff to view and accept tasks specified in the work order. Publishing the work order tasks causes the **Publish** button to toggle to **Unpublish**.
- **Delete** - Delete the current work order.
- **Un-Publish** - Use this button to retrieve previously published tasks specified by the work order. Unpbublishing work order tasks causes the **Unpublish** button to return to **Publish**.

Header

The application provides an information header between the toolbar and the work order data canvas, which contains the following information about the current work order:

- **Work Order Name** - Name of the work order. This field is editable.
- **Requester** - The staff member requesting the work order, which might be different than the staff member who created the work order. This field is editable.
- **Creator** - The staff member who created the work order. This field is read only.
- **ID** - A system assigned, unique ID. This field is read only.

Work Order Data Canvas

The data canvas contains three tabs for recording and displaying work order data:

- **Select Animals** - Add and remove the animals to and from the work order.
- **Select Tasks** - Add and remove tasks to and from the work order.
- **Assign Staff** - Add and remove user groups, to and from the work order.

Select Animals Tab

The Select Animals tab contains an animal display grid, an **Add Animals** button, and a **Remove Animals** button. To add animals click the **Add Animals** button and select them from the pop-up selection grid. To remove animals select them from the display grid and click the **Remove Animals** button.

Select Tasks Tab

The Select Tasks tab contains tow buttons:

- **Add Tasks** - Use this button to add a task template.
- **Remove** - Use this button to remove the selected task template.

Assign Staff

This tab contains two tagging canvases:

- **Task User Groups** - Enables the addition of one or more User Groups.
- **Staff** - Enables the addition of one or more Staff using a Select Staff dialog box.

Creating Work Orders

Use the following procedure to create a work order.

1. Access the **Create Work Orders** feature.
2. Enter the name of the work order in the Work Order Name field.
3. Enter the name of the requester in the **Select Requester** button if the requester is someone different than the creator of the work order. The application assists you with the type ahead feature. Type in the first two characters of the requester's ID and the application presents a list of potentially matching IDs.
4. Click the **Select Tasks** tab.
5. Click the **Add Tasks** button. The application presents a selection grid containing available task templates.

6. Select the appropriate templates.
7. Click **OK**. The application populates the task grid with the tasks from the selected task templates. The default scheduled start date is the current date and no scheduled start time. To schedule a different date
   a. Click the repeating task button (rectangular cycle glyph) located to the left of the of the task name. The application displays the Schedule Repeating Task dialog.
   b. Click the Date field in the Schedule Task On section. You can enter the date manually, but the application also displays a calendar from which you can select the required date.
   c. Select the date.
   d. Click the Time field in the Schedule Task On section to enter a start time. You can enter the time manually, but the application also displays a time key pad used to enter the time. The keypad has three columns:
      - Hours
      - Minutes (five minute increments)
      - AM/PM
   e. Click the up and down arrows on the hour column to scroll through the hours and select the correct hour when it is visible in the keypad display.
   f. Click the up and down arrows on the minute column to scroll through the minutes and select the correct minute when it is visible in the keypad display.
   g. Click AM or PM in the AM/PM column.

   Using this dialog you also have the option of making any task repeating. The dialog supports two options: pattern-driven or calendar-driven. Use the following procedure:
   a. Set the recurrence pattern in the Recurrence Pattern section.
   b. Set the end date in the End Recurrence section. Click the **End After** radio button to specify the last date the tasks will run. Select the **End By** radio button, to run tasks up until the end date, exclusive of the end date.
   c. Click **OK** to accept the repeating parameters or **Close** to close the dialog without saving the parameters.
   d. Repeat this procedure for each repeating task.
8. Click the **Assign Staff** tab to display the **Task User Groups** and **Staff** grids.
9. Enter group names and staff names in their respective fields to assign the work order to staff. The application assists you with the type ahead feature. Enter the first two characters of the group or staff and the application will produce a list of potentially matching names.
10. Review all three tabs to ensure that all information is correct.
11. Click the **Publish** button to put the work order into production and make the work order tasks available to staff members. The **Publish** button toggles to **Unpublish**.
12. Click the **Unpublish** button to withdraw the work order tasks from production. There is no limit to the number of times you can toggle the work order between published and unpublished. When it has a status of Completed, the Work Order cannot be reset to Draft (Unpublished).

Copying Work Orders

After work orders have been created, you can copy them and create similar work orders. For example if you need to perform the set of tasks specified by an existing work order on a different animal, you can simply copy the work order, assign it to a different animal, and set a new start time. This feature improves efficiency in your day-to-day workflow.

Use the following procedure to copy a work order:

1. Click the Work Orders icon on the Veterinary main screen, and select either **Edit ID'd Animals** or **Edit Non-ID'd Animal Work Orders** option. The application displays the Select Work Orders grid.
2. Select the Work Order you want to copy.
3. Click the **Copy** button in the toolbar. The application displays the Select Animals dialog.
4. Click **OK**.
5. Select the animals you want to assign to the new work order. The application displays the the Select First Task Schedule Date-Time dialog.
6. Enter the start date and time for the first task in the work order.
7. Click **OK**. The application copies the work order with the new animal assignment and start date and time. It then notifies you the copy has been copied with a notification dialog.
8. Click the close button on the notification dialog. The work order initially has a status of Draft.
9. Make any necessary adjustments.
10. Click the **Publish** button in the toolbar to publish the new work order.

Veterinary Management – Perform Scheduled Tasks

The Perform Tasks feature enables the recording of tasks assigned to you. When you access the Perform Tasks feature the application displays the list of tasks that are assigned to you or any group of which you are a member. The assigner should provide a list of animals, a description of the task and instructions for performing the task.

When you complete the task, you can open it and mark it complete, taking the task out of your queue. Alternatively the assigner has the option of suspending the task.

To access the Perform Task feature, click the Perform Tasks icon on the Veterinary Management main page and select Perform Scheduled Task option of choice (ID'd or Non-ID'd animals) from the pop-up menu.

The application displays a Select Task grid with all of your tasks. Select the task you want to perform.

What You See

- **Tool bar** - Containing task controls such as Start and Complete.
- **Header** - Contains Basic information about the task such as Task Name and Status.
- **Animal or Cage Display Grid** - A grid containing all the animals or cages for the selected task.

Toolbar

Initially, the toolbar contains the following controls:

- **Open** - Opens a different scheduled task.
- **Start** - Promotes the task to a status of Started. The application automatically promotes the task to Started when you record data in the task. After a task has been promoted to Started, the application replaces the **Start** button with the **Complete** button.
- **Complete** - promotes the task to a status of Completed.
- **Suspend** - Suspends the task from production.
- **Cancel** - Permanently cancels the task.
- **Results** - Grid tasks only. Enables the recording of data.
- **Multi-Edit** - Grid tasks only. Enables recording identical results for multiple animals. Using this feature you select the animals and then enter the results one time for all animals.
- **New Task** - Schedule a new task.
- **New WO** - Schedule a new work order.
- **Ad Hoc Task** - Record a new task that was immediately needed and performed.
- **Related Tasks** - If the current task is part of a work order, this button enables the viewing of other tasks in the work order.

When you change the task status to Started the **Start** button changes to a **Complete** button and a Suspend button is added. You can toggle the status from Started to Completed at will. The **Suspend** button suspends the availability of the of the task, the **Complete** button returns to **Start**, and the **Suspend** button returns to **Complete**.

The cancel button permanently removes the availability of the task from production, but canceled tasks remain editable.

You also have the option of creating a new task, a new work order, or an ad hoc task when you are recording your progress using the Perform Task feature, without leaving your current screen. Clicking any of the **New Task**, **New WO**, or **Ad Hoc** buttons causes the application to present a create screen to create the new task or work order. When you have completed the information on the create screen, click the **Done** button in the upper right corner of the screen. The application responds by dismissing the create task or create work order screen, and returns to the Perform Scheduled Tasks screen.

Header

When you select a task from the Select Task grid, the application opens the task, which contains the following elements in the header

- **Task Name** - The name used to identify the task.
- **Status field** - The current status of the Task:
  - **Draft** - The task has not been published for production.
  - **Published** - The task has been published and is in production.
  - **Started** - The assigned staff member has started the task.
  - **Suspended** - The task has been temporarily halted.
  - **Completed** - The task is complete.
- **Scheduled Date-Time** - The date and time the task was published.
- **Completed Date-Time** - The date and time the task was completed.
- **Task Costs** - Enter or edit costs associated with the task.
- **Description** - A description of the task.
- **Instructions** - Instructions for performing the task.

Completed Tasks and Audit Trails

Veterinary Management supports an optional Audit Trails feature that can records transaction in a log. If the Audit Trails feature is turned on, making a change to a task with a status of Completed triggers a pop-up dialog that requests a reason for the change before continuing. This includes changing the status of the task.

If you make making multiple changes to the task record such as multiple fields in a form task, the system produces the pop-up dialog only after the first change. All subsequent changes use the same reason you provided for the first change.

Task Entry Types

When you perform a task it is associated with an entry type, which governs the way you record data associated with the task. Veterinary Management supports three types of entries:

- **Status Entry** - Status entries are typically assigned for a single action such as administering a drug. In such case cases, after the task has been performed you update the status entry to indicate that the task has been performed.

- **Form Entry** - Form entries are for more complex tasks that can involve multiple procedures and interactions with an animal. In the case of a form entry, the person assigned to the task answers questions related to the task being performed.
- **Grid Entry** - Grid entries are tables comprising rows of animals and columns of tasks to be performed. Grids are typically used for gathering information like weight or animal condition.

Working with Form Entries

When working with a form entry you will be working in an electronic form with three panels–one on the left and two on the right, one below the other. In the form, a tool bar is located above the form panels containing controls for navigating, editing, and viewing the form.

Form Toolbar

The toolbar contains the following navigation and display buttons:

- **Hide/Show** - The **Hide** button hides the numbering for all elements within the outline tree, which is described in the next section Outine panel. Clicking the **Hide** button causes it to toggle to **Show**.
- **Expand** - Fully expands the outline tree.
- **Collapse** - Fully collapses the outline tree.
- **First** - Selects the first question on the form.
- **Previous Section** - Selects the first question of the previous section.
- **Previous** - Selects the previous question within respect to the current question.
- **Next** - Selects the next question in the current section.
- **Next Unanswered** - Selects the next question unanswered question on the form.
- **Last** - Selects the last question on the form.
- **Close** - Closes the form.

Note: Tasks with a status of closed can still be edited.

The Outline Panel

The Outline panel contains an outline of the form on the left side of the screen. The outline is displayed as a collapsible tree, containing sections, questions and question options. A numbering and indentation system enables an unambiguous view of sections, which contain questions, and questions that can contain options and other question.

You can navigate to any question by clicking on it in the tree. This action displays the element in the other two panels, Current Question, and Preview.

Note: Options are only visible if the selected option of the current question has children.

The Current Question Panel

The Current Question panel displays the current question in an editable frame, located in the upper right of the form screen. As the case progresses use this panel to record data. The Current Question panel also assists in safeguarding against errors. If you enter data that is unexpected, the field will reject the entry. For example, if you enter text in a date field, when you navigate to another field the date field will remain empty, containing only the date format prompt. The field does not accept the text.

Preview Panel

The Preview panel displays the current question as it appears when a user views the form, and is located in the lower right corner of the form screen. Although the panel is uneditable, it does allow navigation in the form by clicking on a question. You can click on a question in the Preview panel, that becomes the current question.

Note: Options are only visible if it is selected ***and*** it has children.

Keyboard Accelerators

In the TOPAZ form builder, you are not limited to mouse navigation. You can navigate the entire form using your keyboard. In the Editor panel, for example you can navigate from one field to the next using the tab key. Likewise, in the Form Outline panel you can navigate from one section to the next using the up and down arrow keys.

An accelerator legend is available by striking the **?** key on your keyboard. To escape out of the legend strike the **Esc** key.

Toggling between Navigation Mode and Edit Mode

When you are navigating the outline tree, you can edit the current question by simply clicking on that question in the Current Question panel. For your convenience, though, you can also toggle between Navigation mode and Edit mode.

While navigating the outline tree, strike the **F2** key to enter Edit mode . The application places the cursor on the first field of the current question. You can then use the tab key to proceed to subsequent fields within the current question. This enables quick transfer to editable fields for the purpose of performing all edits on the current question.

To return to navigation mode strike the **Esc** key.

Working with Task Form Questions

The form creator creates task forms, anticipating the kind of data that must be collected on the form. The questions in the form are supported by specific field types that enable the answering of different types of questions. For example, some tasks might require the recording of tabular data that is best suited for entry into a table. Plain text fields and rich text fields are also supported to provide unstructured answers.

Attachments to Form Answers

Questions also support the attachment of electronic documents as part of the answer. If the question allows attachments, a paperclip glyph is directly located below the question number. Click the paperclip to display the pop-up attachment dialog. Using the dialog you can navigate to the document location and double click it.

If the answer already contains one or more attachments, clicking the paperclip displays an attachment dialog containing the current attachments and a paperclip glyph. Click the paperclip to attach additional document using the attachment dialog.

Supported Questions

Veterinary Management supports the following field types to accommodate a variety of question types:

Animal Info - This field is read only and is only for ID'd animal forms. The purpose of the field is to ensure that those performing a certain task on a specific animal can verify that the animal and form match. it contains the following data:

- Species
- Strain/Stock/Breed
- Gender
- Alternate IDs
- Protocol
- Animal Owner
- Principal Investigator
- Location

Animal Status - The purpose of the field is to allow those performing a task to view and edit the status of an animal as appropriate. This question displays an **Animal Status** button. When you click this button, the application displays a list of statuses from which to choose. Selecting a status updates Animal Census without the requirement of leaving Veterinary Management. The task displays the status next to the **Animal Status** button.

Body Weights - This field enables the recording of the weight of ID'd Animals. Values must be positive numerals with a maximum of seven before the decimal point and two following the decimal place (i.e. xxxxxxx.yy). Units of measure cannot be specified in the field.

Cage Information - This field is read only for Non-ID'd Animals. It contains the following data:

- Cage Identifier
- # Animals
- Gender
- Species
- Strain/Stock/Breed
- Protocol Number
- Animal Owner
- Principal Investigator
- Location

Date - This field provides a calendar button on the form so that staff preparing the form can enter a date.

Number - Use this field to specify a number such as animal length. Numeric fields do not accept text. Entering text generates an immediate error message next to the field.

Plain Text - Use this field to enter simple text such as a description.

Recorded Date/Time - Use this field to record the date and time that task data was actually captured, regardless of when it is entered. Using this field, you can capture data on schedule and recorded later, allowing you operational flexibility.

Rich Text - This field is like a plain text field, but it contains an editor that supports what are called *rich text* features.These features include text formatting. Font treatment such as bold, italic, and underscore, is supported as are bullet and ordered lists. You can also insert image URLs and create tables using editor controls that are intuitive and easy to use.

Related Cases - Use this field to record cases that are associated with the with the task. Sometimes, a task is directly related to a case that has been opened. For example, a remedial task such as antibiotic injections might be associated with a clinical case in which an animal has an infection. Use this field to record such associations.

Note: The Related Cases field does nothing more than enable documentingthe association of cases with the current task. The system does not share this information with the associated case.

Table - This field enables the creation of a table in which staff members can enter multiple arrays of data. Set the number and names of columns when setting up the form, and users can add as many rows as needed, one at a time.

Initially the table contains only a table header and a single, blank row, with multiple columns. An **X** and a star are located to the left of the row. Click the **X** and click the star to add a row directly under the current row.

Populate the column cells with the appropriate data and determine whether additional rows are required. If so, click the star and continue adding data.

Task Info - This is read only and lists the following requisite information:

- **Task Name** - The name of the task.
- **Scheduled Date/Time** - The date and time the task was started. This field is automatically populated when the task is promoted to Started, but can be edited if the actual start date and time is different.
- **Completed Date/Time** - The date and time the task was completed. This field is automatically populated when you click the **Complete** button, but it can be edited if the actual completed date and time is different.
- **Task Requested By** - The staff member requesting the task. Defaults to the member who created the task.
- **Task Completed By** - The staff member who completed the task. Defaults to the member who created the task.
- **Description** - A plain text field for describing the task.
- **Instructions** - A plain text field for providing instructions.

Termination Date - This question is for recording the date of animal termination. This question displays a **Terminate Animal** button. When you click this button, the application displays a date field with a calendar assistant from which you can select a date. Selecting a date updates Animal Census without the requirement of leaving Veterinary Management. The task displays the date next to the **Terminate Animal** button.

Child Questions

Veterinary Management supports the concept of child questions for certain types of fields. These are questions nested within existing questions. The following fields are hierarchical by design and support child questions:

- **Multi-Option** - This type of field enables a question with multiple possible answers that are not part of a list defined by the system or an administrator. For example, if the task is a hygienic task, you might be required to examine the animal and decide what is needed. In such a case the form creator might offer
  - Bathing
  - Teeth cleaning
  - Nail trimming

  A Multi-Option question enables the selection any or all of those options.
- **Single-Option** - This type of field is for questions that allow only one response from a list of two or more. For example, if your task is to report on the behavioral condition of the animal options such as
  - Typical
  - Agitated
  - Lethargic
  - Other

  In this case the question would only permit one response.
- **Multi-Select** - This type of field is similar in concept to Multi-Option but used for questions with multiple possible answers that are part of a list defined by the system or an administrator. A typical example would be a list of drugs of which you must select all the drugs you administered to an animal:
  - Drug A
  - Drug B
  - Drug C

  Depending on why you're treating the animal and the current protocol, you might be limited to only one of those drugs or you might have a requirement to administer more than one. Multi-Select questions give you that option.

These questions can all contain child questions, which can also contain other child questions. It is possible, for example, for the form creator to provide a Multi-Option question in which one of the options has a child that is also a Multi-Option question. In such a case, the form asserts the child question, nested within the parent so that you have the opportunity to answer it.

Outline Tree Navigation and View with Nested Child Questions

Nested child questions that are not pertinent to the current questions are hidden from view to simplify the tree, making it more intuitive and easier to navigate. For example, you have a Multi-Option question, and only one of the options has a child question. In such a case, you will see the child question only when you select the option with that child question. If you select another option without a child question, all child questions are hidden from view.

Performing Tasks

Use the following procedure to perform a task:

1. Access the Perform task feature. The application displays the Select Task dialog.
2. Click the task you want to perform. The application populates the display grid with the animals or cages for that task. In the case of Status and Form tasks a glyph in the shape of a fountain pen located to the left of the animal row enables data recording and updates. In the case of Grid tasks a **Results** glyph in the shape of a pencil, located in the toolbar enables data recording and updates.
3. Click the record data glyph described in step 2 for one of the animal rows. The application displays a separate dialog for recording data.
4. Record the task data if you have already begun the task, or click the **Start** button in the toolbar to indicate you are starting the task. If you begin updating the task without clicking the start button, the task will automatically be promoted to Started.
5. Repeat steps 3 and 4 for each animal until all animals are complete.
6. Click the **CLOSE** button. The application returns to the task.

Adding and Editing Task Costs

You can add or edit the cost of a task at any time until the cost has been invoiced. After invoicing this feature is disabled. Use the following procedure:

1. Click the Task Costs icon. The system displays the Task Costs dialog, displaying the account of the current user if the user has an account.
2. Enter the name of the account if there is no account or the wrong account in the Staff Account field.
3. Select a service in the Billable Services field.
4. Click the **Add** button.
5. Enter the correct quantity in the Quantity column.
6. Enter the correct cost in the Unit Cost column.
7. Repeat steps 3 through 6 until all applicable billable services are complete.
8. Click **Done**.

Opening a Case Related to an Animal on a Task

The Perform Task display grid contains a book-shaped glyph that enables the creation of a case related to the animal for which the task was created. Click it to navigate to the Create Case screen. You can now create a case and the system records it as a case related to the animal.

Closing and Linking Related Cases While Performing a Task

The Perform Task display grid contains a filing cabinet shaped glyph that represents cases related to the animal for which the task was created. Click it to display a pop-up dialog that allows you to link the current task to one of those cases, or close one of those cases.

Recording Identical Results for Multiple Animals on Grid Tasks

Grid tasks often contain simple tasks like recording an observation or weighing the animal. Depending on the type of task it is possible that you must record the same results for multiple animals. For example, if you have exposed the animal to an agent that might cause a rash, the task might be simply to record whether a rash has developed.

In such cases, you have the option of concurrently recording all the animals that have a rash. Use the following procedure:

1. Access the Perform task feature. The application displays the Select Task dialog.
2. Click the grid task you want to perform. The application populates the display grid with the animals or cages for that task.
3. Click the check boxes for the animals for which you will record the same result.
4. Click the **Mult-Edit** button. The application displays the multi-edit dialog containing any previously recorded results. If no result has been previously recorded, the result will contain the word, **Empty**.
5. Record the results.
6. Click **Done**.

Viewing Related Tasks While Performing a Task on a Work Order

When you are performing a scheduled task that is part of a work order, you have the option of viewing related tasks that are part of that work order. Use the following procedure:

1. Click the **Related Tasks** button in the toolbar. The application displays the list of work order tasks in a grid in front of the current task.
2. Click the task you want to view. The application displays the selected task in a separate dialog in front of the display grid.
3. Click **Done** when you are through viewing the task. The application dismisses the task dialog and returns you to the display grid.
4. Repeat steps 2 and 3 for each task you want to view.
5. Click elsewhere on the current task to dismiss the task display grid.

Suspending Tasks

1. Access the Perform Task feature.
2. Click the task you want to perform. The application displays the task.
3. Click the **Suspend** button.

Completing Tasks

1. Access the Perform Tasks feature and select your task, if you are not already using the feature.
2. Ensure all required fields have the appropriate data.

3. Click the **Completed** button. The system assigns the current time and date as the completed time and date.
4. Enter the **Completed Date-Time** if the task was completed at an earlier time.

Veterinary Management – Perform Ad Hoc Tasks

Occasionally, an unscheduled task arises that must be tended to immediately. In these cases you can use the ad hoc task feature to record and perform the task without scheduling it ahead of time.

TOPAZ supports types of ad hoc features:

- Create ID'd Animal AdHoc Task
- Create Non-ID'd AdHoc Task

To access the ad hoc feature, place the cursor over the **Perform** icon on the Veterinary Management main screen and select either the **Create ID'd Animal AdHoc Task** or the **Create Non-ID'd Animal AdHoc Task** option. This action opens the select animals or cages grid from which you can select the appropriate animals. The application then displays the Select Task Templates grid from which you can select a task template. The application responds by creating a task using these two pieces of data, and populates a grid canvas with the tasks.

Important: Depending on the Result Entry Type that is selected for a task template (Form Entry, Grid Entry, or Status Entry), different views and options are available. Refer to Creating Task Templates section of this user guide for details regarding these result entry types.

What You See

After selecting the task targets The Perform Unscheduled Animal screen contains elements that enable access to several features described in the following sections.

Tool Bar

- **Start** - Promote the task to a status of Started.
- **Complete** - Promote the status of the task Completed, requiring no additional action.
- **Suspend** - Temporarily remove the task from production.
- **Cancel** - Use this button to cancel the task, permanently removing it from production.
- **Close** - Close the task.

Fields

- **Task Name** - This field is automatically populated with the name of the task template.
- **Status** - The status of the task, such as Started or Suspended.
- **Started Date-Time**- The date and time the task was created.
- **Completed Date-Time** - The date and time the task was completed.
- **Description** - Displays the description provided by the creator of the task template.
- **Instructions** - Displays instructions provided by the creator of the task template.

Task Entry Types

When you perform a task it is associated with an entry type, which governs the way you record data associated with the task. Veterinary Management supports three types of entries:

- **Status Entry** - Status entries are typically assigned for a single action such as administering a drug. In such case cases, after the task has been performed you update the status entry to indicate that the task has been performed.
- **Form Entry** - Form entries are for more complex tasks that can involve multiple procedures and interactions with an animal. In the case of a form entry, the person assigned to the task answers questions related to the task being performed.
- **Grid Entry** - Grid entries are tables comprising rows of animals and columns of tasks to be performed. Grids are typically used for gathering information like weight or animal condition.

Working with Form Entries

When working with a form entry you will be working in an electronic form with three panels–one on the left and two on the right, one below the other. A tool bar is located above the form panels containing controls for viewing and navigating the form.

Form Toolbar

The toolbar contains the following navigation and display buttons:

- **Hide/Show** - The **Hide** button hides the numbering for all elements within the outline tree, which is described in the next section Outine panel. Clicking the **Hide** button causes it to toggle to **Show**.
- **Expand** - Fully expands the outline tree.
- **Collapse** - Fully collapses the outline tree.
- **First** - Selects the first question on the form.
- **Previous Section** - Selects the first question of the previous section.
- **Previous** - Selects the previous question within respect to the current question.
- **Next** - Selects the next question in the current section.
- **Next Unanswered** - Selects the next question unanswered question on the form.
- **Last** - Selects the last question on the form.
- **Close** - Closes the form.

Note: Tasks with a status of closed can still be edited.

The Outline Panel

The Outline panel contains an outline of the form on the left side of the screen. The outline is displayed as a collapsible tree, containing sections, questions and question options. A numbering and indentation system enables an unambiguous view of sections, which contain questions, and questions that can contain options and other question.

You can navigate to any question by clicking on it in the tree. This action displays the element in the other two panels, Current Question, and Preview.

Note: Options are only visible if the selected option of the current question has children.

The Current Question Panel

The CURRENT QUESTION panel displays the current question in an editable frame, located in the upper right of the form screen. As the case progresses use this panel to record data. The CURRENT QUESTION panel also assists in safeguarding against errors. If you enter data that is unexpected, the field will reject the entry. For example, if you enter text in a date field, the when you navigate to another field the date field will remain empty, containing only the date format prompt. The field does not accept the text.

Preview Panel

The Preview panel displays the current question as it appears when a user views the form, and is located in the lower right corner of the form screen. Although the panel is uneditable, it does allow navigation in the form by clicking on a question. You can click on a question in the Preview panel, that becomes the current question.

Note: Options are only visible if it is selected ***and*** it has children.

Keyboard Accelerators

In the TOPAZ form builder, you are not limited to mouse navigation. You can navigate the entire form using your keyboard. In the EDITOR panel, for example you can navigate from one field to the next using the tab key. Likewise, in the FORM OUTLINE panel you can navigate from one section to the next using the up and down arrow keys.

An accelerator legend is available by striking the **?** key on your keyboard. To escape out of the legend strike the **Esc** key.

Working with Task Form Questions

The form creator creates task forms, anticipating the kind of data that must be collected on the form. The questions in the form are supported by specific field types that enable the answering of different types of questions. For example, some tasks might require the recording of tabular data that is best suited for entry into a table. Plain text fields and rich text fields are also supported to provide unstructured answers.

Attachments to Form Answers

Questions also support the attachment of electronic documents as part of the answer. If the question allows attachments, a paperclip glyph is directly located below the question number. Click the paperclip to display the pop-up attachment dialog. Using the dialog you can navigate to the document location and double click it.

If the answer already contains one or more attachments, clicking the paperclip displays an attachment dialog containing the current attachments and a paperclip glyph. Click the paperclip to attach additional document using the attachment dialog.

Supported Questions

Veterinary Management supports the following field types to accommodate a variety of question types:

Animal Info - This field is read only and is only for ID'd animal forms. The purpose of the field is to ensure that those performing a certain task on a specific animal can verify that the animal and form match. it contains the following data:

- Species
- Strain/Stock/Breed
- Gender
- Alternate IDs
- Protocol
- Animal Owner
- Principal Investigator
- Location

Animal Status - The purpose of the field is to allow those performing a task to view and edit the status of an animal as appropriate. This question displays an **Animal Status** button. When you click this button, the application displays a list of statuses from which to choose. Selecting a status updates Animal Census without the requirement of leaving Veterinary Management. The task displays the status next to the **Animal Status** button.

Body Weights - This field enables the recording of the weight of ID'd Animals. Values must be positive numerals with a maximum of seven before the decimal point and two following the decimal place (i.e. xxxxxxx.yy). Units of measure cannot be specified in the field.

Cage Information - This field is read only for Non-ID'd Animals. It contains the following data:

- Cage Identifier
- # Animals
- Gender
- Species
- Strain/Stock/Breed
- Protocol Number
- Animal Owner
- Principal Investigator
- Location

Date - This field provides a calendar button on the form so that staff preparing the form can enter a date.

Number - Use this field to specify a number such as animal length. Numeric fields do not accept text. Entering text generates an immediate error message next to the field.

Plain Text - Use this field to enter simple text such as a description.

Recorded Date/Time - Use this field to record the date and time that task data was actually captured, regardless of when it is entered. Using this field, you can capture data on schedule and recorded later, allowing you operational flexibility.

Rich Text - This field is like a plain text field, but it contains an editor that supports what are called *rich text* features.These features include text formatting. Font treatment such as bold, italic, and underscore, is supported as are bullet and ordered lists. You can also insert image URLs and create tables using editor controls that are intuitive and easy to use.

Related Cases - Use this field to record cases that are associated with the with the task. Sometimes, a task is directly related to a case that has been opened. For example, a remedial task such as antibiotic injections might be associated with a clinical case in which an animal has an infection. Use this field to record such associations.

Note: The Related Cases field does nothing more than enable documentingthe association of cases with the current task. The system does not share this information with the associated case.

Table - This field enables the creation of a table in which staff members can enter multiple arrays of data. Set the number and names of columns when setting up the form, and users can add as many rows as needed, one at a time.

Initially the table contains only a table header and a single, blank row, with multiple columns. An **X** and a star are located to the left of the row. Click the **X** and click the star to add a row directly under the current row.

Populate the column cells with the appropriate data and determine whether additional rows are required. If so, click the star and continue adding data.

Task Info - This is read only and lists the following requisite information:

- **Task Name** - The name of the task.
- **Scheduled Date/Time** - The date and time the task was started. This field is automatically populated when the task is promoted to Started, but can be edited if the actual start date and time is different.
- **Completed Date/Time** - The date and time the task was completed. This field is automatically populated when you click the **Complete** button, but it can be edited if the actual completed date and time is different.
- **Task Requested By** - The staff member requesting the task. Defaults to the member who created the task.
- **Task Completed By** - The staff member who completed the task. Defaults to the member who created the task.
- **Description** - A plain text field for describing the task.
- **Instructions** - A plain text field for providing instructions.

Termination Date - This question is for recording the date of animal termination. This question displays a **Terminate Animal** button. When you click this button, the application displays a date field with a calendar assistant from which you can select a date. Selecting a date updates Animal Census without the requirement of leaving Veterinary Management. The task displays the date next to the **Terminate Animal** button.

Child Questions

Veterinary Management supports the concept of child questions for certain types of fields. These are questions nested within existing questions. The following fields are hierarchical by design and support child questions:

- **Multi-Option** - This type of field enables a question with multiple possible answers that are not part of a list defined by the system or an administrator. For example, if the task is a hygienic task, you might be required to examine the animal and decide what is needed. In such a case the form creator might offer
  - Bathing
  - Teeth cleaning
  - Nail trimming

  A Multi-Option question enables the selection any or all of those options.
- **Single-Option** - This type of field is for questions that allow only one response from a list of two or more. For example, if your task is to report on the behavioral condition of the animal options such as
  - Typical
  - Agitated
  - Lethargic
  - Other

  In this case the question would only permit one response.
- **Multi-Select** - This type of field is similar in concept to Multi-Option but used for questions with multiple possible answers that are part of a list defined by the system or an administrator. A typical example would be a list of drugs of which you must select all the drugs you administered to an animal:
  - Drug A
  - Drug B
  - Drug C

  Depending on why you're treating the animal and the current protocol, you might be limited to only one of those drugs or you might have a requirement to administer more than one. Multi-Select questions give you that option.

These questions can all contain child questions, which can also contain other child questions. It is possible, for example, for the form creator to provide a Multi-Option question in which one of the options has a child that is also a Multi-Option question. In such a case, the form asserts the child question, nested within the parent so that you have the opportunity to answer it.

Outline Tree Navigation and View with Nested Child Questions

Nested child questions that are not pertinent to the current questions are hidden from from view to simplfy the tree, making it more intuitive and easier to navigate. For example, you have a Multi-Option question, and only one of the options has a child question. In such a case, you will see the child question only when you select the option with that child question. If you select another option without a child question, all child questions are hidden from view.

Performing ID'd Animal Ad Hoc Tasks – Status Entry

Use the following procedure to perform a status entry ad hoc task:

1. Hover the cursor over the Perform icon.
2. Select the create ad hoc task option. The application displays the Select Identified Animals or the Select Non-Identified Animals grid.
3. Select the appropriate animals.
4. Click **OK**. The application displays the Select Task Template grid. The far right column in the grid, labeled Result Entry Type, indicates the type of entry for each task template.
5. Click the status entry task template you want to use for this task. The application displays the task display grid populated with your selected tasks.
6. Select a task. The application displays the Enter Comments dialog.
7. Enter any comments that are appropriate for the task. The application illuminates the **Complete Task** button, indicating it is enabled.
8. Click the **Close** button in the toolbar to close the form.
9. Click the **Complete** button in the toolbar when the task is complete.

Performing ID'd Animal Ad Hoc Tasks – Form Entry

Use the following procedure to perform a form entry ad hoc task:

1. Hover the cursor over the Perform icon.
2. Select the create ad hoc task option. The application displays the Select Identified Animals or the Select Non-Identified Animals grid.
3. Select the appropriate animals.
4. Click **OK**. The application displays the Select Task Template grid. The far right column in the grid, labeled Result Entry Type, indicates the type of entry for each task template.
5. Select the form entry task template you want to use for this task.If you selected only one animal, the application displays the form for the task template you selected. If you selected multiple animals, the application displays the task display grid populated with your selected tasks. Proceed to step 6.
   a. Complete the form.
   b. Proceed to step 7.
6. Perform the following procedure:
   a. Click the edit button for a task. The application presents the form.
   b. Complete the form.
   c. Repeat steps a and b until all forms have been updated.
7. Click the **Close** button in the toolbar to close the form.
8. Click the **Complete** button in the toolbar when the task is complete.

Performing ID'd Animal Ad Hoc Tasks – Grid Entry

Use the following procedure to perform a grid entry ad hoc task:

1. Hover the cursor over the Perform icon.
2. Select the create ad hoc task option. The application displays the Select Identified Animals or the Select Non-Identified Animals grid.
3. Select the appropriate animals.
4. Click **OK**. The application displays the Select Task Template grid. The far right column in the grid, labeled Result Entry Type, indicates the type of entry for each task template.
5. Click the grid entry task template you want to use for this task. The application displays the task display grid populated with your selected tasks.
6. Enter the data from the task on the task grid. The **Complete** button illuminates indicating that it is active.
7. Click the **Close** button in the toolbar to close the form.
8. Click the **Complete** button in the toolbar when the task is complete.

Veterinary Management – View All Tasks

Not everyone concerned with veterinary tasks is expected to create, assign, and perform tasks. A DVM Director of a large facility, for example, might elect to assign those responsibilities to one or more clinical veterinarians. However, the Director may still want to monitor task activities. The View Tasks feature makes this possible and enables adaptation of veterinary care to meet local workflow needs.

To access the View Tasks feature, Click the **Perform Tasks** icon on the **Veterinary Management** main screen and select the **View Tasks** option. This action opens the Select Task grid, displays all tasks for which you are the creator, requester.

If you are part of a user group and have access to all task assignments in your User Group, the grid also displays all the tasks for your user group.

Select the tasks you want to view.

What You See

The View All Tasks feature presents a read only view. Tasks displayed in View All Tasks cannot be edited in that view. To edit a task, refer to the section of this manual with the title *Edit Scheduled Task*.

Toolbar

- **Open** - Use this button to return to the Select Task grid.
- **Show** - Use this button to redisplay your list of tasks after you have selected one or more tasks assigned to you. Selecting it displays the selection grid on the Task Canvas Grid (rather than a pop-up dialog) and you can either review your list of tasks or select additional tasks.

Header

Displays the following details about the current task:

- TASK NAME
- STATUS
- STARTED DATE-TIME
- COMPLETED DATE-TIME
- DESCRIPTION
- INSTRUCTIONS

Task Canvas Grid

Initially, this grid displays your selected tasks, without details, each task in a separate row.

You can then select a task and view details by opening it as described in the Viewing Tasks procedure.

Viewing Tasks

Use the following procedure to view tasks:

1. Access the View Tasks feature, from the Perform Tasks icon. The application displays the Select Tasks grid dialog.
2. Select the tasks you want to view.
3. Click **OK**. The application displays your selected tasks on the task canvas grid.
4. Click on one of the tasks. The application makes that task the current task for viewing.
5. Click the magnifying glass glyph to the left of the task. The application displays task details and places the following glyphs in the toolbar
    - **Hide/Show** - Hides details of the task without closing the detail view. The button then toggles to Show. Clicking this button shows details of the task.
    - **Close** - Closes the detail view of the current task.
6. Click the **Close** button to close the detailed view and return to the current task without details.
7. Click The **Show** button to view the original list of tasks you selected for viewing.
8. Repeat steps 5 through 7 for each task you want to view.

Veterinary Management – Creating and Editing Cases

The Create New Case feature in Veterinary Management allows users to create a new veterinary medical case record for a specific animal.

To access the Create New Case feature, click the **Cases** icon on the Veterinary Management main screen and select the **Create Cases** option. This action opens the Create New Case screen.

What You See

The Create Case screen contains the following elements:

Toolbar

- **New** - Use this button to create a new case after you finish creating the current case. You can create as many cases as needed without leaving this screen.
- **Edit** - Edit an existing case.
- **Open/Close** - Changes the status of the current case from Draft to Open, enforces the population of all mandatory fields in the associated form, and make the case available for usage. The application replaces the **Open** button with a **Close** button. Click the **Close** button to close the case.
- **Delete** - Delete the existing case.

Header

- **Case Name** - This field enables the entry of a user-friendly name for the case. It is initially populated with the case number. You should replace the case number with a name before activating the case.
- **Animal ID** - This field enables the selection of the ID for the subject of the case you are creating. The field remains editable, allowing you to select a different animal at a later time in the event the wrong animal ID was erroneously entered. If the animal ID is changed at a later date the history of both animals is updated to reflect an accurate history.

  Note: If you change the animal ID at a later time, and one or more of related tasks are not associated with the new animal, you are notified of a validation error. In such cases, add the missing task.

- **Form Name** - This field enables the selection of a form for the case you are creating. Use the drop-down menu to select a form. After the case is promoted to Opened, this field becomes read only.
- **Case Type** - This field enables you to select a case type from a master list. After the case is promoted to Opened, this field becomes read only.
- **Description** - This field enables the provision of descriptive information about the case. Entering a description is highly recommended.
- **Case Number** - This field contains a system-assigned, unique identifier.
- **Created On** - This field is automatically populated with the current date.
- **Created By** - This field displays the staff member creating the new case.

- **Opened On** - This field displays the date the case status was set to Open.
- **Opened By** - This field displays the staff member who set the case status to Open.
- **Closed On** - This field displays the date the case status was set to Closed.
- **Closed By**- The staff member who set the case status to Closed.
- **Status** - This field displays the current case status. It is initially populated with the status Draft.

Below the separator is the Case Form canvas. After a case has been created, the canvas contains an **Open Form** button, used to open the form for the current case. The form is a platform for recording data regarding the current case.

For example, if the case is a surgery case, the form might contain questions related to the and recovery of the animal. This might include things like checking the condition of specified parts of the animal, whether progress is being made, prognoses and other necessary items.

Closed Cases and Audit Trails

Veterinary Management supports an optional Audit Trails feature that records transaction in a log. If the Audit Trails feature is turned on, making a change to a case with a status of Closed triggers a pop-up dialog that requests a reason for the change before continuing. This includes changing the status of the case to Open.

If you make making multiple changes to the case record such as multiple fields in a form, the system produces the pop-up dialog only after the first change. All subsequent changes use the same reason you provided for the first change.

Working with Case Forms

To open a case form, Click the **Open Form** button. The application displays the form, which includes a toolbar and three panels.

Toolbar

The toolbar contains the following navigation and display buttons:

- **Hide/Show** - The **Hide** button hides the numbering for all elements within the outline tree, which is described in the next section Outline panel. Clicking the **Hide** button causes it to toggle to **Show**.
- **Expand** - Fully expands the outline tree.
- **Collapse** - Fully collapses the outline tree.
- **First** - Selects the first question on the form.
- **Previous Section** - Selects the first question of the previous section.
- **Previous** - Selects the previous question within respect to the current question.
- **Next** - Selects the next question in the current section.
- **Next Unanswered** - Selects the next question unanswered question on the form.
- **Last** - Selects the last question on the form.
- **Close** - Closes the form.

Note: Cases with a status of closed can still be edited.

The Outline Panel

The OUTLINE panel contains an outline of the form on the left side of the screen. The outline is displayed as a collapsible tree, containing sections, questions and question options. A numbering and indentation system enables an unambiguous view of sections, which contain questions, and questions that can contain options and other question.

You can navigate to any question by clicking on it in the tree. This action displays the element in the other two panels, Current Question, and Preview.

Note: Options are only visible if the selected option of the current question has children.

The Current Question Panel

The Current Question panel displays the current question in an editable frame, located in the upper right of the form screen. As the case progresses use this panel to record data. The Current Question panel also assists in safeguarding against errors. If you enter data that is unexpected, the field will reject the entry. For example, if you enter text in a date field, when you navigate to another field the date field will remain empty, containing only the date format prompt. The field does not accept the text.

Preview Panel

The PREVIEW panel displays the current question as it appears when a user views the form, and is located in the lower right corner of the form screen. Although the panel is uneditable, it does allow navigation in the form by clicking on a question. You can click on a question in the PREVIEW panel, that becomes the current question.

Note: Options are only visible if it is selected ***and*** it has children.

Keyboard Accelerators

In the TOPAZ form builder, you are not limited to mouse navigation. You can navigate the entire form using your keyboard. In the Current Question panel, for example you can navigate from one field to the next using the tab key. Likewise, in the Outline panel you can navigate from one section to the next using the up and down arrow keys.

An accelerator legend is available by striking the **?** key on your keyboard. To escape out of the legend strike the **Esc** key.

Toggling between Navigation Mode and Edit Mode

When you are navigating the outline tree, you can edit the current question by simply clicking on that question in the Current Question panel. For your convenience, though, you can also toggle between Navigation mode and Edit mode.

While navigating the outline tree, strike the **F2** key to enter Edit mode . The application places the cursor on the first field of the current question. You can then use the tab key to proceed to subsequent fields within the current question. This enables quick transfer to editable fields for the purpose of performing all edits on the current question.

To return to navigation mode strike the **Esc** key.

Working with Case Form Questions

The form creator creates case forms, anticipating the kind of data that must be collected on the form. The questions in the form are supported by specific field types that enable the answering of different types of questions. For example, some tasks might require the recording of tabular data that is best suited for entry into a table. Plain text fields and rich text fields are also supported to provide unstructured answers.

Attachments to Form Answers

Questions also support the attachment of electronic documents as part of the answer. If the question allows attachments, a paperclip glyph is directly located below the question number. Click the paperclip to display the pop-up attachment dialog. Using the dialog you can navigate to the document location and double click it.

If the answer already contains one or more attachments, clicking the paperclip displays an attachment dialog containing the current attachments and a paperclip glyph. Click the paperclip to attach additional document using the attachment dialog.

Supported Questions

Veterinary Management supports the following field types to accommodate a variety of question types:

Animal Info - This field is read only and is only for animal forms. The purpose of the field is to ensure that those performing a certain task on a specific animal can verify that the animal and form match. it contains the following data:

- Species
- Strain/Stock/Breed
- Gender
- Alternate IDs
- Protocol
- Animal Owner
- Principal Investigator
- Location

Date - This field provides a calendar button on the form so that staff preparing the form can enter a date.

Number - Use this field to specify a number such as animal length. Numeric fields do not accept text. Entering text generates an immediate error message next to the field.

Plain Text - Use this field to enter simple text such as a description.

Recorded Date/Time - Use this field to record the date and time that task data was actually captured, regardless of when it is entered. Using this field, you can capture data on schedule and recorded later, allowing you operational flexibility.

Rich Text - This field is like a plain text field, but it contains an editor that supports what are called *rich text* features.These features include text formatting. Font treatment such as bold, italic, and underscore, is supported as are bullet and ordered lists. You can also insert image URLs and create tables using editor controls that are intuitive and easy to use.

Related Tasks - Use this field to record tasks that are associated with the with the case. Sometimes, a case is directly related to a task that has been created. For example, clinical case in which an animal has an infection might require a remedial task such as antibiotic injections. Use this field to record such associations.

Note: The Related Tasks field does nothing more than enable documenting the association of tasks with the current case . The system does not share this information the associated task.

Table - This field enables the creation of a table in which staff members can enter multiple arrays of data. Set the number and names of columns when setting up the form, and users can add as many rows as needed, one at a time.

Initially the table contains only a table header and a single, blank row, with multiple columns. An **X** and a star are located to the left of the row. Click the **X** and click the star to add a row directly under the current row.

Populate the column cells with the appropriate data and determine whether additional rows are required. If so, click the star and continue adding data.

Child Questions

Veterinary Management supports the concept of child questions for certain types of fields. These are questions nested within existing questions. The following fields are hierarchical by design and support child questions:

- Multi-Option - This type of field enables a question with multiple possible answers that are not part of a list defined by the system or an administrator. For example, if the case is opened to treating an infection, you might be required to examine the animal and decide what is needed. In such a case the form creator might offer the following options:
    - Antibiotic injection
    - Application of a salve
    - Bandage application

  A Multi-Option question enables the selection any or all of those options.
- Single-Option - This type of field is for questions that allow only one response from a list of two or more. For example, if the case is to evaluate the behavioral condition of the animal the form creator might offer the following options:
    - Typical
    - Agitated
    - Lethargic
    - Other

  In this case the question would permit only one response.
- Multi-Select - This type of field is similar in concept to Multi-Option but used for questions with multiple possible answers that are part of a list defined by the system or an administrator. A typical example would be a list of drugs of which you must select all the drugs you administered to an animal:

- Drug A
- Drug B
- Drug C

Depending on why you're treating the animal and the current protocol, you might be limited to only one of those drugs or you might have a requirement to administer more than one. Multi-Select questions give you that option.

These questions can all contain child questions, which can also contain other child questions. It is possible, for example, for the form creator to provide a Multi-Option question in which one of the options has a child that is also a Multi-Option question. In such a case, the form asserts the child question, nested within the parent so that you have the opportunity to answer it.

Outline Tree Navigation and View with Nested Child Questions

Nested child questions that are not pertinent to the current questions are hidden from view to simplfy the tree, making it more intuitive and easier to navigate. For example, you have a Multi-Option question, and only one of the options has a child question with additional options. In such a case, you will see the nested child only when you select the option with that child question. If you select another option, that child question will be hidden from view.

Further, you only see nested questions one generation deep. For example, the current question is the ultimate parent of a child question, which in turn has a child question. In such a case the second generation child question is hidden from view while the parent question is active as the current question. This is true for all subsequent generations of child questions. Each subsequent generation, displays only the next generation.

Creating a New Case

1. Access the Create Cases feature.
2. Enter a unique name in the **Case Name** field.
3. Click the add button (plus sign) on the Animal ID field. The application displays the select Identified Animal dialog.
4. Click the animal for which the case is intended.
5. Select a form name from the **Select form name** drop down menu.
6. Select the case type from the **Select case type** drop down menu.
7. Enter appropriate details in the **Description** field.
8. Click the **Open Form** button. The application displays the case form.
9. Complete the case form.
10. Click the **Close** button to close the form and return to the case view.
11. Click the **Close** button to close the case.

Editing an Existing Case

1. Click the **Create Cases** icon.
2. Click the **Edit Cases** option. The application displays the Select Case grid.

3. Select the case you want to edit. The application displays the selected case.
4. Click the **Open Form** button.
5. Perform the necessary edits to the case information.
6. Click the **Close** button on the form.

Close an Open Case

1. Click the **Create Cases** icon. The application displays a pop-up menu.
2. Click the **Edit Cases** option. The application displays the Select Case grid.
3. Click the case you want to close. The application displays the selected case.
4. Click the **Close** button. The application displays a Close Case calendar dialog.
5. Select a date on the pop-up calendar.
6. Click the **Close** button in the toolbar to close the case or **Cancel** to abort the operation.

The application automatically populates the CLOSED ON field with the current date and time and the CLOSED BY field with the staff member who closed the case. You can edit these fields if the actual date and time, and the closing staff member are different than field contents.

Veterinary Management – View Animal History

The View Histories feature enables the viewing of details for one or more animals. The application displays animal histories as a series of events for each animal, beginning with the most recent event. Events include things such as Case Status (Open or Closed) or Task Completed. The process for examining the history of identified animals and non-identified animals is the same.

To access this feature, click the **View Histories** icon on the Veterinary Management Main screen and select the ID'd Animal History, or Non-ID'd Animal History option. This action displays a Select Animal dialog from which you select the animals of interest.

The View History feature is a two-step process. You first search for animals of interest and then specify which history records you want to see for the selected animals.

What You See

The View History screen contains the following elements:

Toolbar

- **Open** - Perform a new search for a different set of animals.
- **More** - Display the next 100 animals or history records.
- **Full History Report** - Create a full report of the history of the selected animal. This button is only visible when you select an animal that has a history to report (tasks have been performed on the animal). The report includes all attachments that are included in the animal history.

Selecting and Filtering Animals

Typically, users accumulate a significant number of animals with extensive histories. An initial view of the history of even a few animals can obscure your ability to understand their history. To assist you with quick and easy navigation of individual animal histories, Veterinary Management includes a simplified filtering system that enables the selection of a large set of animals. The filter uses a drop-down list of attributes such as

- Task Name
- Case Name
- Protocol Number
- Animal ID

Using the filter is not mandatory for selecting the set of animals of interest. The selection dialog presents the list of all animals and you can either use the filter or click on individual animals to select them. The animals are displayed in groups of 20 along with a **more** button (down arrow glyph) in the lower left corner of the dialog. Click the **more** button to view the next 20 animals or refine your search using the filter.

After you have selected the animals of interest, the display grid displays all the animals in sets of 100. Clicking the **more** button in the toolbar displays the next 100 animals (200 total). Each time you click the more button the application displays 100 more animals. At any time you can filter the existing set to examine to the history of a subset. This secondary filter contains a drop-down list that contains attributes such as

- Task Type
- Task Completed
- Case Type
- Case Closed

Viewing Animal Histories

Use the following procedure to search a set of animals and review its history:

1. Hover the mouse cursor over the **Histories** icon. The application displays the **View ID'd Animal History** and **View Non-ID'd Animal History** options.
2. Select the **View ID'd Animal History** or **View Non-ID'd Animal History** option. The application displays the Select Animals dialog, either click the animals you want to select or use the filter as described:
    a. Click the the arrow to the right of blank field with a drop-down arrow located on the far right of the dialog.
    b. Enter a name for the filter you want to create in the Filter Name field.
    c. Click the drop down arrow to display a list of animal attributes.
    d. Click attribute that applies to your search, such as Animal ID.
    e. Click the **+** button. The filter adds the attribute and a value field for the attrubute.
    f. Enter the attribute value in the value field.
    g. Click the Not check box if you want to eclude this value; otherwise skip to step i.
    h. Repeat steps c through g for each attribute you want to add. You can now save your search using the following procedure:
        i. Type a name for the search in the Filter Name field.
        ii. Click the **save** button (floppy disk glyph at the top of the dialog).
        iii. To delete the search click the **delete** button (trash can glyph at the top of the dialog).
        iv. Click the Default check box to make this search your default search.
    i. Click the **apply filter** button (left arrow glyph at the top of the dialog). The dialog narrows the animal list to only those that meet your filtering criteria.
    j. Click **OK** when you are satisfied with your search results. The application displays a history summary of all events for each animal, beginning with the most recent event. Each event for each animal is represented in a single row.
3. Click the **Show** arrow in the right corner of the toolbar to display the secondary filter. You can now further filter your results by operating the secondary filter as described in steps 2 a - f.
4. Click the rows for the histories you want to see. The application displays the **Full History Report** button, previously hidden from view.
5. Click the Full History Results button. The application displays a full, detailed history of the events you selected, in a separate browser tab.

6. Hover the cursor over the lower right corner of the screen to display the following options:
    a. Zoom in
    b. Zoom out
    c. Save
    d. Print

NOTE: Not all users have edit privilege to histories results.

Veterinary Management – Reports

The primary value of TOPAZ Elements, as an integrated application suite, is the ability to collect, store and organize data. That data, however, is worthless if it cannot be reported. As you perform tasks, you record all the necessary information about the animal for that task, the task itself, and administrative information such as e-signatures. This chapter explains how to create reports on that information.

Creating E-Signature Reports

Use the following procedure to create an e-signature report:

1. Click the Reports icon on the Veterinary Management screen. The application presents a drop-down menu.
2. Select the E-Signature Report option. The application navigates to the E-Signature Report display and selection grid of all e-signature events, each represented in a separate row.
3. Select the events with which you want to populate the report. The application highlights all selected events and displays the E-Signature Report button. You can deselect events by clicking them after you have selected them (highlighted events).
4. Click the E-Signature Report button. The application displays the report in a separate tab.

Creating Audit Trail Reports

TOPAZ supports audit trail capability. When the Audit Trail feature is in use, the system records every occurrence of two events:

- Completed tasks
- Closed cases

The Audit Trail Reports feature enables the selection of specific events of this type for the purpose of compiling them into a formatted report. The Audit Trail feature must be explicitly enabled by an administrator before these events can be recorded for reporting. Use the following procedure to create an audit trail report for environments that use the Audit Trail feature:

1. Click the Reports icon on the Veterinary Management screen. The application presents a drop-down menu.
2. Select the Audit Trails Report option. The application navigates to the Audit Trails Report display and selection grid of all audit trail events, each represented in a separate row.
3. Select the events with which you want to populate the report. The application highlights all selected events and displays the Audit Trails Report button. You can deselect events by clicking them after you have selected them (highlighted events).
4. Click the Audit Trails Report button. The application displays the report in a separate tab.