



Project name: Erneuerung E-TV

Outcome name: User Manual for Institutes

Version: 0.9

**Bundesamt für Lebensmittelsicherheit  
und Veterinärwesen BLV**

# User Manual for Institutes animex-ch

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## List of Abbreviations

ACT: Animal Care Taker  
AP: System Administrator  
ASF: Administrative Support of Facility  
ASI: Administrative Support of Institute  
AWOF: Animal Welfare Officer of Facility  
AWOI: Animal Welfare Officer of Institute  
CM: Commission Member  
CO: Canton Operator  
FVO: Federal Veterinary Officer  
HAF: Head Animal Facility  
IPF: Involved Person of Facility  
IPI: Involved Person of Institute  
MCA: Main Course Accreditor  
RM: Resource Manager  
SCA: Secondary Course Accreditor  
SDF: Study Director of Facility  
SDI: Study Director of Institute  
[N]: New application  
[R]: Renewal application  
[SC]: Supplementary application  
[SP]: Personnel supplementary application  
[SV]: Extension of validity supplementary application  
[SR]: Personnel supplementary application for Resource Manager or Principal Study Director





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# 1 General instructions

## Supported browsers

The browsers supported by the system are: Edge Chromium, Chrome, Firefox, Safari, and Android browser.

## Navigation menus

The navigation is achieved by using the main navigation menu, as it is displayed in the following screenshot:

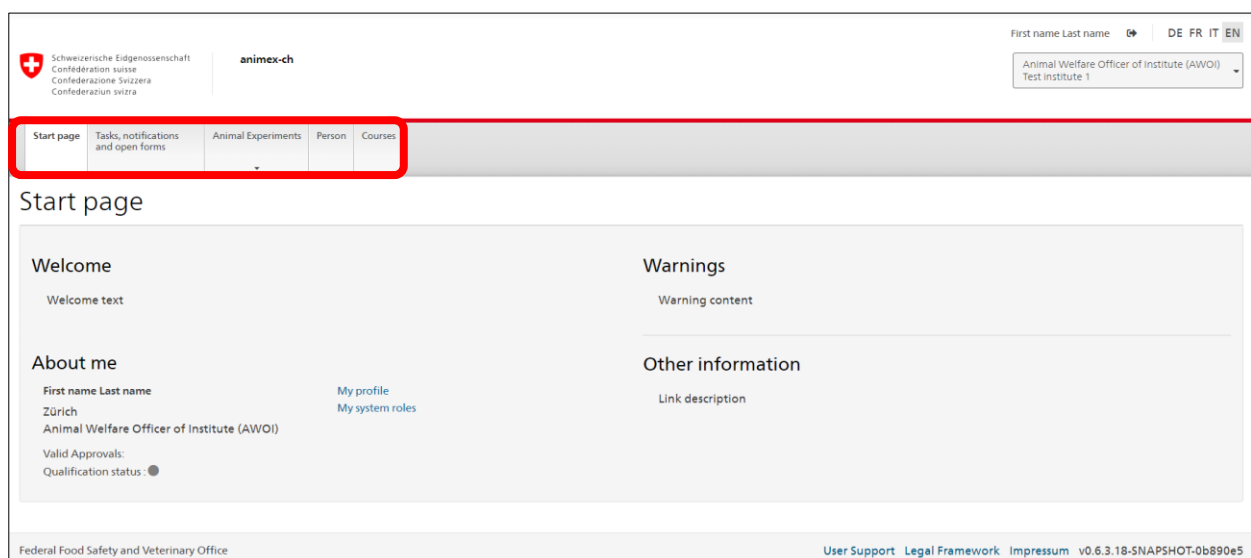


Figure 1 – Main navigation menu

Then, depending on the selection on the main navigation menu, the navigation can be continued using a left navigation menu. For example, when the “Animal Experiments” from the main navigation menu is selected and after that a specific application for animal experiment is opened, then the left navigation menu displayed below can be used:



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Figure 2 – Left navigation menu

## Automatic save

The following forms are automatically saved every 3 minutes: Form A, Form H, Form G, Form M, and Form D. The same applies to the following reports: Report AC and Report HC.

## Time-out

The time-out occurs automatically after 20 minutes, if no action has been performed.

## Mandatory fields

The mandatory fields are indicated with a red asterisk beside them. These fields must be completed in order to have a successful validation by the system and in order to be able to proceed with the further steps of each process.

## Notes

Important notes will be included as a section under each chapter of this document.

# 2 Generic functions

## 2.1 Buttons

### 2.1.1 “Cancel” action

There are two different ways of canceling an action:

- By clicking on the “Cancel” button or on the “Close” button.  
Then the system asks for confirmation of action, where in case of confirmation, the system closes the pop-up window without performing any action.



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- By selecting something that directs away from the current page. For instance, by selecting to search for an application for animal experiment, while editing an application for animal experiment. In this case, the system redirects away from the application for animal experiment, to the search page.

### 2.1.2 “Back to results list” button

When navigating to an object via a search or a results list page, returning to that page is possible by clicking on the button: “Back to results list”.

This button applies for:

- Applications for animal experiment
- Courses (Education & Training)
- Personnel

Example: Perform the following steps:

1. Search for a specific application for animal experiment by navigating to the main navigation menu option: “Animal experiments”, and, then select: “Applications for animal experiments”.
2. Select the tab: “Extended”.
3. Enter the “Title” and the “Institute name” in the search criteria.
4. Set the results per page to “25”.
5. Click on the button: “Search”.

After the search, it is found out that the desired application is located on the second page of the results set.


6. Open the application by clicking on the national number hyperlink.
7. Use the button: “Back to results list”, to return back to the applications for animal experiment search page (originating page).

The system displays the search page pre-filled with the “Title”, the “Institute name”, and the number of results per page set to “25”. The second page of results will be displayed.

There is also the possibility of using the browser’s “Back” button. Then, the system redirects to the previous page (originating page).

### 2.1.3 “Back to the top” button



The “Back to the top” button:  is applied in [“3 Personnel”](#), [“4 Courses”](#), and [“5 Application for animal experiment”](#). This button appears on the right side of a page, when scrolling down is performed.

## 2.2 (All) Select login role

The following steps apply to all pages of animex-ch:

1. In the upper right section of a page click on the currently logged-in role.

Alternative: In the right side of all pages after scrolling down on any page, click on the currently logged-in role abbreviation.

2. Select a role from the system roles list. Roles with enabled system access are displayed with their associated institute / animal facility / canton.
3. Click on the “Apply” button.

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- The logged-in user's name (which is located in the header) is displayed fully separated from the logged-in role. The logged-in user's name works as a hyperlink and navigates to the profile page of person ("Edit person" page).
- The roles are sorted according to the following order: AWOI, RM, SDI, IPI, ASI.
- During the first login, the logged-in user role is automatically selected by the system based on the last logged-out user role. If the last logged-out user role is no longer available, the system will select a role according to sorting of roles in selector.

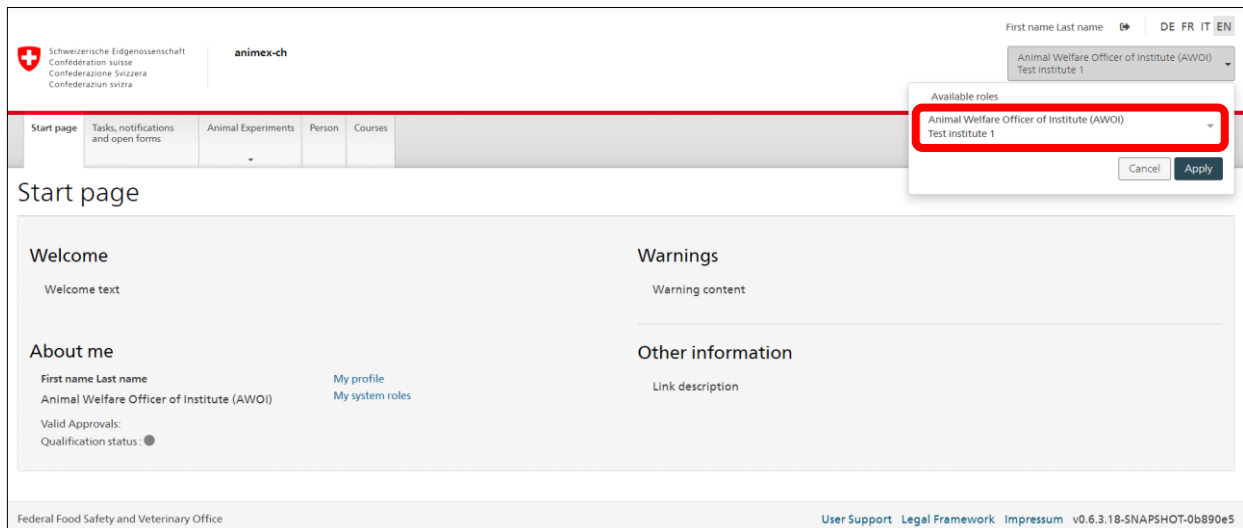



Figure 3 – Select login role

## 2.3 (All) Logout

1. On any page of animex-ch, select the "logout" icon: , which exists on the top right corner.

The system asks for confirmation of request.

2. In order to confirm, click on "Yes".

**Note:** A timeout occurs after 20 minutes. When requesting an action after this timespan, the system performs the logout and displays the "Logout" page. Any unsaved changes will be lost in this case.

## 2.4 (All) View "Start page"

One of the following actions should be performed in order to view the "Start page":

Login to the system or

Alternative 1: Select the top navigation menu: "Start page".

Alternative 2: Click on the Swiss confederation logo, which exists on the top left corner.

The "Start page" contains the following sections:

- The "Welcome" section: It contains generic information about animex-ch.
- The "About me" section: It contains information about your logged-in system role and the corresponding approval (including qualification status colour). Furthermore, it contains



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the following hyperlinks:

- "My profile"
- "My system roles"
- The "Warnings" section: It contains messages from the AP on issues that require attention.
- The "Other information" section: It contains hyperlinks, internal or external, relevant to the system e.g., Federal law on the welfare of animals, etc..

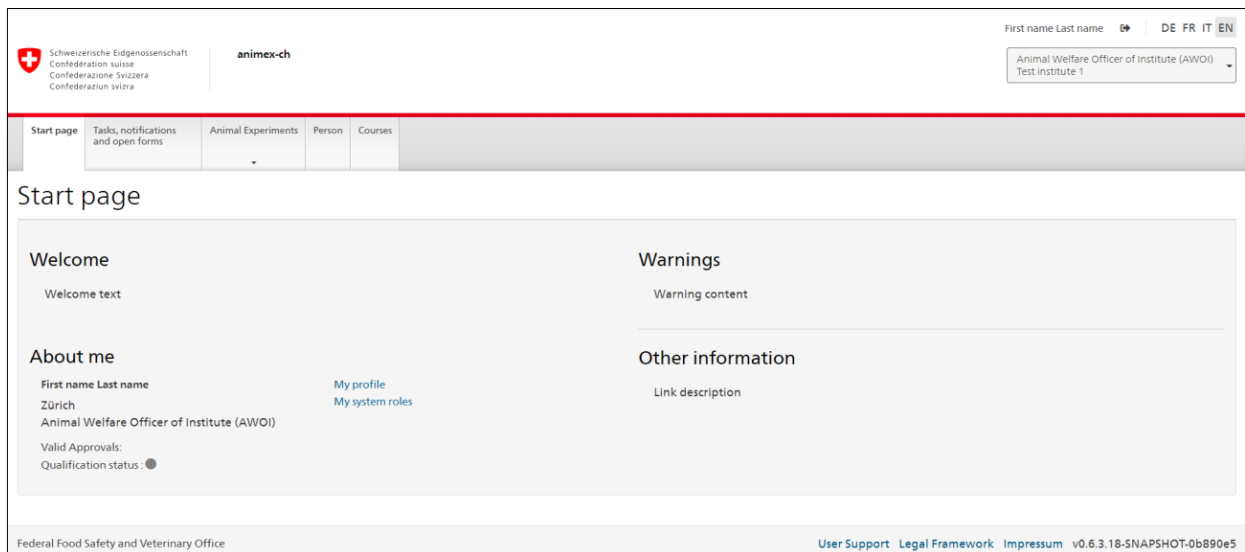



Figure 4 – Start page

## 2.5 (All) View online help

The online help can be viewed using the tooltip functionality across the animex-ch application.

For this, hover over or click on the "info" icon: , which is located next to specific labels and form fields. Then the system presents a pop-up window with explanatory information regarding the relevant object. By clicking again, or moving away from the icon, the system hides the information.

## 2.6 (All) View "User Support" page

In order to view the "User Support" page, select the footer: "User Support" of animex-ch application. This footer exists in all animex-ch pages.

### 2.6.1 (All) View "Frequently asked questions"

In order to view the frequently asked questions and their answers, perform the following steps:

1. Select the footer: "User Support" of animex-ch application. This footer exists in all animex-ch pages.
2. Navigate to chapter: "Frequently asked questions".

The system displays the frequently asked questions list.




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- Click on the icon:  of a specific question in order to expand the section and see the answer.

The system displays the answer.

- Click on the icon:  of a specific question in order to collapse the section and hide the answer. (This step is optional.)

The system hides the answer.



Figure 5 – Frequently asked questions

## 2.6.2 (All) View “User manuals” list

In order to view the “User manuals” list, perform following steps:

- Select the footer: “User Support” of animex-ch application. This footer exists in all animex-ch pages.
- Navigate to chapter: “User manuals”.

The system displays the “User manuals” list.

**Note:** The user manuals with “Level”: “Institute / Facility” are visible for all roles.


User manuals			
Title	Description	Level	Action
1 - User Manual for Institutes E-TV.docx		Institute/Facility	

Figure 6 – User manuals

### 2.6.2.1 (All) Download user manual

A user manual can be downloaded as described below:



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1. Select the footer: “User Support” of animex-ch application. This footer exists in all animex-ch pages.
2. Navigate to chapter: “User manuals”.

The system displays the “User manuals” list.



3. Click on the icon: , which exists under the “Action” column.

The system donwloads the user manual.

Note: Only the user manual of the selected animex-ch language is downloaded.

### 2.6.3 (All) View “Videos” list

In order to view the “Videos” list, perform the following steps:

1. Select the footer: “User Support” of animex-ch application. This footer exists in all animex-ch pages.
2. Navigate to chapter: “Videos”.

The system displays the “Videos” list.

Note: The videos with “Level”: “Institute/Facility” can be visible for all roles.


Videos			
Title	Description	Level	Action
Edit person.mp4		Institute/Facility	

Figure 7 – Videos

#### 2.6.3.1 (All) Download video

A video can be downloaded as described below:

1. Select the footer: “User Support” of animex-ch application. This footer exists in all animex-ch pages.
2. Navigate to chapter: “Videos”.

The system displays the “Videos” list.



3. Click on the icon: , which exists under the “Action” column.

The system donwloads the video.

### 2.6.4 (All) Request user support

In order to request support from the FSVO helpdesk, perform the following steps:





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1. Select the footer: “User Support” of animex-ch application. This footer exists in all animex-ch pages.
2. Navigate to “FSVO helpdesk” chapter.
3. Fill-in the field: “Request description”.
4. Click on the button: “Manage documents” in order to add document(s). (This step is optional.)
5. Click on the button: “Submit request”.

The system sends an e-mail to the FSVO helpdesk e-mail address and a confirmation message is displayed.

The “Request description” text area is cleared and the system remains on the “User Support” page.

Figure 8 – FSVO helpdesk

## 2.7 (All) Navigate in paginated lists

When a table or a results list has more than 10 rows, these results are separated into paginated sets. The number of displayed entries per page can be changed from “10” to “25” or “50”. The navigation in the paginated lists is performed as following:

Select a page number for navigation to a specific list page. (E.g., select the page number “2”.)

Alternative 1: Select the button: “Next”:  for navigation to the next list page.

Alternative 2: Select the button: “Previous”:  for navigation to the previous list page.

Alternative 3: Select the icon:  for navigation to the last list page.

Alternative 4: Select the icon:  for navigation to the first list page.

### Notes:

- “10” results is the default pre-selected number of rows.
- When the number of entries per page is changed (e.g., from “10” to “25”), then the first



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page of results is displayed again.

- If a different number of entries is selected, the sorting is retained.
- If a navigation to another page is performed, the sorting is retained.
- The last page of a paginated list may contain less entries than the selected number of results per page.

Example: When having 10 entries per page and the total number of entries is 16, then the first page displays 10 entries and the second page displays 6 entries.

## 2.8 (All) Export list to XLSX and CSV format

The search results lists and other lists can be exported as XLSX or CSV files by following the steps below:

1. Click on the button: "Export", which exists above specific lists.
2. Click on either the "Export to XLSX" button or on the "Export to CSV" button.

Depending on the selected button at step 2, the system creates an XLSX or a CSV file and sends it to the browser.

### Notes:

- All the list entries are exported, not only the entries displayed on the first page.
- Only the columns displayed, are exported.

The screenshot shows the 'Application Search - Animal Experiments' page. At the top, there's a header with the Swiss Confederation logo and the text 'animex-ch'. Below the header, there's a navigation bar with 'Start page', 'Tasks, notifications and open forms', 'Animal Experiments', 'Person', and 'Courses'. The main content area is titled 'Application Search - Animal Experiments'. It features a search bar with 'Full-text' selected, and filters for 'Draft', 'Pending', 'Valid', and 'Invalid'. Below the search bar, there's a table with columns: 'NATIONAL NUMBER', 'CANTONAL NUMBER', 'TITLE OF THE APPLICATION', 'RESOURCE MANAGER', 'INSTITUTE', 'APPLICATION TYPE', 'STATUS', and 'INTER'. The 'Export' button is highlighted in red, and the 'Export to XLSX' and 'Export to CSV' options are also highlighted in red.

Figure 9 – Export list to XLSX and CSV format

## 2.9 (All) Sort list

Tables and search results lists that consist of multiple entries may be sorted by a specific column.

The sorting function can be executed on all tables or search results lists, when clicking on a column. By clicking on a column, an arrow symbol appears beside the column name.



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The arrow symbol beside a column name indicates the selected sorting order, which can be either ascending (from the smallest to the largest number) or descending (from the largest to the smallest number).

Sorting in ascending order:

NATIONAL NUMBER ▾
1
2
3
4
5

Sorting in descending order:

NATIONAL NUMBER ▲
5
4
3
2
1

## 2.10 Tasks

### 2.10.1 (All) Search task

In order to search for a task, perform the following steps:

1. Navigate to main navigation menu: “Tasks, notifications and open forms”.

The system displays the “Tasks” page, which contains the following:

- In the upper section: The search form, which enables the searching of specific tasks.
  - In the lower section: The “Tasks” list with the tasks allocated to the user.
2. Fill-in the desired search criteria.
  3. Click on the button: “Search”.

The system retrieves the search results for the tasks allocated to the user based on the defined search criteria.

#### Notes:

- Each task is bound to a specific user role and is displayed, only when this role matches your logged-in role.
- The full-text search searches on the fields: “Object title” and “Task description”. It is enabled, only after selecting the “Object” on the first search filter.
- The “Received date” search field consists of two separate date-pickers: “From” & “To”, which search for the “Received date”.
- The tasks that are not yet clicked, are highlighted.



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Figure 10 – Search task

## 2.10.2 (All) View “Tasks” list

In order to view the “Tasks” list, perform the following steps:

1. Navigate to main navigation menu: “Tasks, notifications and open forms”.

The system displays the “Tasks” page, which contains the following:

- In the upper section: The search form, which enables the searching of specific tasks.
  - In the lower section: The “Tasks” list with the tasks allocated to the user.
2. Fill-in the desired search criteria.
  3. Click on the button: “Search”.

The system retrieves the search results for the tasks allocated to the user based on the defined search criteria.

### Notes:

- In case of not performing a search, the system retrieves automatically the list of allocated tasks.
- A task disappears automatically from the “Tasks” list, after this task is executed.



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Figure 11 – “Tasks” list

## 2.11 Notifications

### 2.11.1 (All) View “Notifications” list

In order to view the “Notifications” list, perform the following steps:

1. Navigate to main navigation menu: “Tasks, notifications and open forms”.
2. Select the “Notifications” tab.

The system displays the “Notifications” page, which contains the “Notifications” list with the allocated notifications.

#### Notes:

- Each notification is bound to a specific user role and is displayed only when this role matches your logged-in user role.
- The notifications that are not yet clicked, are highlighted.



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Figure 12 – “Notifications” list

## 2.12 Archived notifications


### 2.12.1 (All) Archive notification

In order to archive a notification, perform the following steps:

1. Navigate to main navigation menu: “Tasks, notifications and open forms”.
2. Select the “Notifications” tab.

The system displays the “Notifications” page, which contains the “Notifications” list with the allocated notifications.

3. Select notification(s) by clicking on the checkbox, which exists beside each notification.

Alternative: Click on the icon:  and then click on the option: “Select all”.

4. Click on the button: “Archive”.

The system asks for confirmation of request.

5. In order to confirm, click on “Yes”.

The selected notifications are moved into the “Archived notifications” tab and a confirmation message is displayed.

The system remains on the “Notifications” page.

**Note:** The option: “Select all” is used in order to select all visible notifications. This means that if multiple paginated results are retrieved, only the current page results will be selected.



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The screenshot shows the 'Tasks, notifications and open forms' page. The 'Notifications' tab is active. A table lists notifications. The first notification is 'Training course' from 'Test institute 1'. The 'Archive' button is highlighted with a red box.

OBJECT	INSTITUTE/FACILITY	OBJECT TITLE	STATUS	NOTIFICATION DESCRIPTION	LAST VISITED DAY	RECEIVED AT
Training course	Test institute 1	Training course 1 / First name Last name	Submitted	Training course has been submitted		22.07.2020 19:47:12

Figure 13 – Archive notification

## 2.12.2 (All) View “Archived notifications” list

In order to view the “Archived notifications” list, perform the following steps:

1. Navigate to main navigation menu: “Tasks, notifications and open forms”.
2. Select the “Archived notifications” tab.

The system displays the “Archived notifications” page with a table similar to the “Notifications” table, but with the exception that it contains manually archived notifications.

**Note:** Each notification is bound to a specific user role and is displayed only when this role matches your logged-in role.

The screenshot shows the 'Tasks, notifications and open forms' page. The 'Archived notifications' tab is active. A table lists archived notifications. The 'Delete' button is highlighted with a red box.

OBJECT	INSTITUTE/FACILITY	OBJECT TITLE	STATUS	NOTIFICATION DESCRIPTION	LAST VISITED DAY	RECEIVED AT
Training course	Test institute 1	Training course 1 / First name Last name	Submitted	Training course has been submitted		22.07.2020 19:47:12

Figure 14 – “Archived notifications” list

## 2.12.3 (All) Delete archived notification

In order to delete archived notification(s), perform the following steps:





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1. Navigate to main navigation menu: “Tasks, notifications and open forms”.
2. Select the “Archived notifications” tab.

The system displays the “Archived notifications” page with a table similar to the “Notifications” table, but with the exception that it contains manually archived notifications.

3. Select archived notification(s) by clicking on the checkbox, which exists beside each notification.

Alternative 1: Click on the icon: , and, then, click on the option: “Select all”.

Alternative 2: Click on the button: “Empty archive”.

4. Click on the button: “Delete”.

The system asks for confirmation of request.

5. In order to confirm, click on “Yes”.

The selected notifications are deleted from the “Archived notifications” tab and a confirmation message is displayed.

**Note:** The option: “Select all” is used in order to select all visible notifications. This means that, if multiple paginated results have been retrieved, only the current page results will be selected.

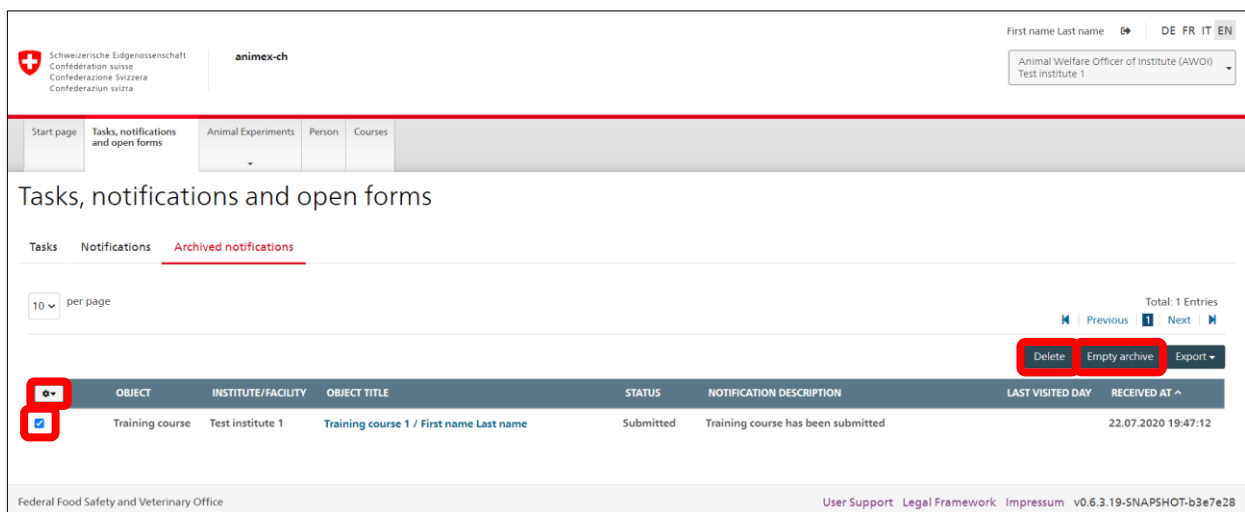


Figure 15 – Delete archived notification

## 2.13 Documents

The description of the documents functionality applies to chapters: “[3 Personnel](#)” and “[5 Application for animal experiment](#)”.

### 2.13.1 (All) View “Documents” list

In order to view the “Documents” list, navigate to “Documents” chapter, which exists on the left navigation menu.



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The system retrieves all documents of this section related to the current status of the business object.

TYPE	NUMBER	FORMAT	TITLE	DESCRIPTION	FILENAME	SIZE KB	DATE	USER	ACTION
Person		DOCK	Test document 1.docx	Test document 1	Test document 1.docx	0	29.04.2020 13:13:03	First name Last name	<a href="#">+</a> <a href="#">-</a> <a href="#">x</a>
Person		DOCK	Test document 2.docx	Test document 2	Test document 2.docx	0	29.04.2020 13:13:13	First name Last name	<a href="#">+</a> <a href="#">-</a> <a href="#">x</a>

Figure 16 – “Documents” list

### 2.13.2 (All) Add document

A document can be added as follows:

1. Navigate to “Documents” chapter, which exists on the left navigation menu.
2. Click on the button: “Add documents”.

The system displays a pop-up window for document uploading.

3. Click for the selection of a file or drag and drop multiple files.
4. Fill-in the optional field: “Description” field.
5. Click on the button: “Save and close”.

The uploaded document is displayed in the “Documents” list.

TYPE	NUMBER	FORMAT	TITLE	DESCRIPTION	FILENAME	SIZE KB	DATE	USER	ACTION
Person		DOCK	Test document 1.docx	Test document 1	Test document 1.docx	0	29.04.2020 13:13:03	First name Last name	<a href="#">+</a> <a href="#">-</a> <a href="#">x</a>
Person		DOCK	Test document 2.docx	Test document 2	Test document 2.docx	0	29.04.2020 13:13:13	First name Last name	<a href="#">+</a> <a href="#">-</a> <a href="#">x</a>

Figure 17 – “Add documents” button

### 2.13.3 (All) Edit document

A document can be edited as follows:

1. Navigate to “Documents” chapter, which exists on the left navigation menu.




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2. Select a document for editing by clicking on the “edit” icon: , which exists under the “Action” column.
3. Update the desired fields.
4. Click on the button: “Save and close”.

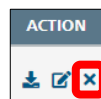
The updated document is displayed in the “Documents” list.

Note: When a document is replaced by a new one, then the previous document is deleted.

### 2.13.4 (All) Delete document

A document can be deleted as follows:

1. Navigate to “Documents” chapter, which exists on the left navigation menu.



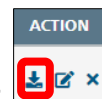
2. Delete a document by clicking on the “delete” icon: , which exists under the “Action” column.


The “Documents” list is updated and displayed without the deleted document.

### 2.13.5 (All) Download document

A document can be downloaded as follows:

1. Navigate to “Documents” chapter, which exists on the left navigation menu.



2. Download a document by clicking on the “download” icon: , which exists under the “Action” column.

The system sends the document to the browser.

### 2.13.6 (All) Download documents as ZIP file

Multiple documents can be downloaded as ZIP file as follows:

1. Navigate to “Documents” chapter, which exist on the left navigation menu.
2. Click on the button: “Download as ZIP”.

All the documents from the list are downloaded as a ZIP file.



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Documents

10 per page

Total: 2 Entries

Previous 1 Next

Download as ZIP Export

TYPE	NUMBER	FORMAT	TITLE	DESCRIPTION	FILENAME	SIZE KB	DATE	USER	ACTION
Person		DOCK	Test document 1.docx	Test document 1	Test document 1.docx	0	29.04.2020 13:13:03	First name Last name	<a href="#">Download</a> <a href="#">Edit</a> <a href="#">Delete</a>
Person		DOCK	Test document 2.docx	Test document 2	Test document 2.docx	0	29.04.2020 13:13:13	First name Last name	<a href="#">Download</a> <a href="#">Edit</a> <a href="#">Delete</a>

[+ Add Documents](#)

Close

Figure 18 – “Download as ZIP” button



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## 3 Personnel

### 3.1 Onboarding

The onboarding refers to the process of granting system access to animex-ch.

#### 3.1.1 Process diagram

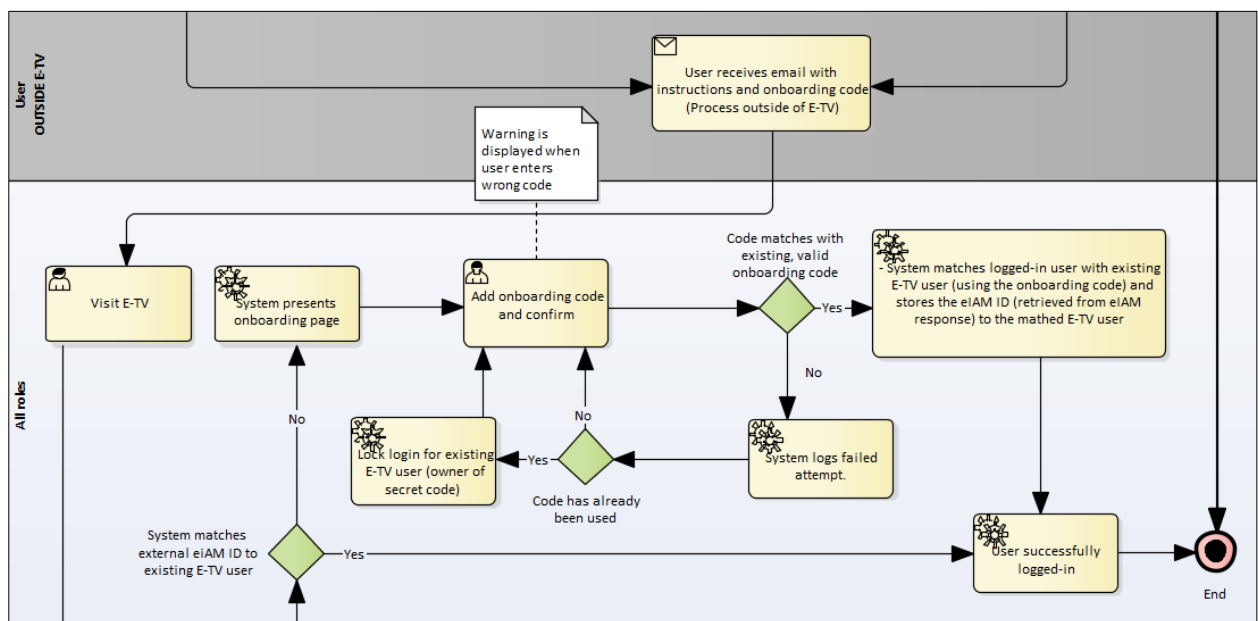


Figure 19 – Process diagram: Onboarding

#### 3.1.2 (All) Request system access for a person

The actions that should be performed and the conditions that should be true in order to trigger the request for system access to the AP are the following:

- A new person should be created (see chapter: [“3.3.1 \(RM, AWOI\) Create new person”](#)) or an existing person should be edited (see chapter: [“3.3.2 \(All\) Edit person”](#)).
- A role system access should be assigned to this person (see chapter: [“3.4.2 \(RM, SDI, AWOI\) Add system role”](#) or chapter: [“3.4.3 \(RM, SDI, AWOI\) Edit system role”](#)).
- The animex-ch system access should be disabled and there should be no pending request.

There are the following cases of “Situations” displayed on the profile page of a person based on the actions performed by the AP:

- Awaiting animex-ch system access
- Active user, with animex-ch system access
- Active user, without animex-ch system access
- Awaiting eIAM binding



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- Inactive user, without animex-ch system access
- Inactive user with animex-ch system access
- User locked, onboarding code reused

### 3.1.3 Resend (regenerate) onboarding code

If there is an issue with the onboarding code, e.g., it cannot be found anymore, the AP (helpdesk: [animex-ch@blv.admin.ch](mailto:animex-ch@blv.admin.ch)) can resend the onboarding code. The action of resending the onboarding code generates a new onboarding code, which replaces the previous code. (See chapter: [“2.6 \(All\) View “User Support” page”](#).)

### 3.1.4 Loss of Vasco token

For IT security reasons, the FSVO helpdesk ([animex-ch@blv.admin.ch](mailto:animex-ch@blv.admin.ch)) must be immediately informed about the loss of a vasco token.

### 3.1.5 Unlock user login

In case of entering an onboarding code that is already used by another user, the system locks the login.

You should contact the AP (helpdesk: [animex-ch@blv.admin.ch](mailto:animex-ch@blv.admin.ch)) to unlock you. (See chapter: [“2.6 \(All\) View “User Support” page”](#).)

## 3.2 Search

### 3.2.1 (AWOI, RM) Search person

In order to search for a person, the following steps should be performed:

1. Navigate to main navigation menu: “Person”.
2. The system displays the “Search person” page.
3. Adjust the search by using one of the tabs: “Full-text” or “Extended search”. When selecting a tab for search, the search criteria in the other tabs are cleared.
4. Click on the button: “Search”.

#### Notes:

- The detailed search criteria are used to perform a search in all parts of a field value (“contains” search). For instance, when a search is performed by entering “nat” in the search field: “First name”, the system searches for all the “First names” that contain “nat”. This would retrieve both a person named: “**N**athalie” and a person named: “Jona**n**than”, because both names contain the value.
- In each search criterion field, where text or number characters are entered at least 3 characters must be entered in order to perform the search.
- The individual search criteria are linked with the operator: “AND”, meaning that all criteria need to be satisfied, in order to retrieve a record.



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Example: If a search is performed with the following criteria:

- “First name”: “John”
- “Last name”: “Smith”

Then, a person named: “John Smith” will be retrieved, but not a person named: “Nathalie Smith”.

- The full-text search field searches on the first name, the last name, and the e-mail of animex-ch users.
- When the “Clear” button is clicked, all search filters are cleared.
- When searching using detailed search fields, the system performs “exact match” search with “contains”. The system matches the same characters containing, umlauts: a, o, u, as well.
- When searching using full-text search, the system performs phonetic (fuzzy) search. The fuzzy matching allows to identify non-exact matches of a target item. This means that relevant search results can be retrieved, even if there is a typo or a different verbal tense in the word used in the full-text search.

Example: If a full-text search is performed with “Jon”, then the system will retrieve results that sound similar to “Jon”, e.g., the system will retrieve “John” as well.

Figure 20 – Search person

### 3.2.2 (AWOI, RM) View “Persons” list

In order to search for a person, the following steps should be performed:

1. Navigate to main navigation menu: “Person”.
2. The system displays the “Search person” page.
3. Adjust the search by using one of the tabs: “Full-text” or “Extended search”. When selecting a tab for search, the search criteria in the other tabs are cleared.
4. Click on the button: “Search”.





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Figure 21 – “Persons” list

### 3.3 Person management

To be able to select a certain person, for example in a Form. A, the person must at first be registered in animex-ch and have the adequate role.

Before creating a new person, always verify if this person already exists or not. Therefore, unnecessary duplicate analysis can be avoided.

#### 3.3.1 (RM, AWOI) Create new person

In order to create a new person, the following steps should be performed:

1. Navigate to main navigation menu: “Person”.
2. The system displays the “Search person” page.
3. Click on the button: “New person”.

The system presents a wizard page, which guides to fill-in the “First name”, the “Last name”, the “Date of birth”, the “E-mail”, the “System role”, the “Institute” (according to the selected system role and the logged-in role). There is also the optional checkbox for system access.

4. Fill-in at least all the mandatory fields.
5. Click on the button: “Save and create”.

The system checks for onboarding process.

If onboarding process has been identified, the system asks for confirmation of request.

6. In order to confirm, click on “Yes”.

The system checks for duplicate person(s)\*.

- If no duplicate person is found, the new person is saved in animex-ch and a confirmation message is displayed.



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Then the system assigns a task to the AP to enable system access for this person.

The edit profile page of the new person is displayed.

- If duplicate person is identified, the new person is saved in animex-ch with “Situation”: “Awaiting duplicate resolution”. (The “Situation” is a description similar to status and appears in the sticky row.) The system creates a task for the CO of the declared institute for resolving the duplicate person.

The edit profile page of the new person is displayed. The new person is not editable at the institute level, as long as the duplicate analysis by the CO is still pending.

#### Notes:

- \* A newly created or edited person can be identified as duplicate when all the following 3 criteria are true:
  - The first name of the newly created or edited person (“Source” person) matches in the 4 initial characters to another person’s (“Target” person) first name.
  - The last name of the newly created or edited person (“Source” person) matches in the 4 initial characters to another person’s (“Target” person) last name.
  - The date of birth of the newly created or edited person (“Source” person) matches to another person’s (“Target” person) date of birth.
- Which system roles can be assigned by each user role is described in detail in chapter: [“3.4.2 \(RM, SDI, AWOI\) Add system role”](#).
- It is (always) important to verify, if a person already exists in the system, in order to avoid duplicates. An already existing person can be identified by searching. (See chapter: [“3.2.1 \(AWOI, RM\) Search person”](#).)
- When a person is identified as “Source” in duplicate analysis, via the edit person process, the corresponding task may be assigned to multiple cantons, according to the defined system roles of the source person. If the task opens for multiple cantons, it will be possible for two COs to work, in parallel (e.g., on the “Merge preview” page), but when the first CO resolves the duplicate task, the task will be closed for all COs. Therefore, it will not be possible to have different decisions. Only, the first submitted task resolution matters.
- When a person is identified as “Source” or “Target” for duplicate analysis and has at least one of the following roles: AP, FVO, CO, MCA, or SCA, then the corresponding task is assigned only to the AP and not to the CO (the CO does not have permissions to resolve this case).



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The screenshot shows the 'Add person' wizard in the animex-ch system. The header includes the Swiss flag and the text 'animex-ch'. The main content area has a form with the following fields: 'First name \*', 'Last name \*', 'Date of birth \*' (with a calendar icon), 'E-mail \*', and 'System role \*' (a dropdown menu). Below these fields is a 'Role system access' checkbox. At the bottom right of the form, there are 'Cancel' and 'Save and create' buttons, with the latter being highlighted by a red rectangle. The footer of the page contains the text 'Federal Food Safety and Veterinary Office' and a link to 'User Support'. The version number 'v0.6.3.3-SNAPSHOT-892da85' is also visible.

Figure 22 – Create new person wizard

### 3.3.2 (All) Edit person

When a profile page of a person is editable, editing of the fields can be performed. After performing any editing, the button: “Save” must be clicked, in order for the system to update the page. The successful saving of the update(s) is indicated with an informative (green) message.

#### Notes:

- When a user has animex-ch system access or is in onboarding process, the fields: “First name”, “Last name”, “Date of birth”, and “E-mail” cannot be changed.
- All roles can edit their own personal details.
- The RM and the AWOI can edit the personal details of all users that belong in the same institute.
- For the calculation of the rules described above, the system always uses the current logged-in role.  
Example: If you want to act as RM for an institute and manage the personnel of this institute, then you should be logged-in as RM.
- If one of the following fields have been modified: “First name”, “Last name”, “Date of birth”, and / or “E-mail”, the identification for duplicate person will be triggered.
- When a person gets into the duplicate analysis process as a “Source”, this person gets “Situation”: “Awaiting duplicate resolution” and is automatically deactivated. During “Awaiting duplicate resolution”, all the fields and all the tables (system roles, courses, documents, etc.) of that person are not editable for any role via the “Edit person” page. The fields become editable again, after the duplicate person(s) resolution has been performed.

### 3.3.3 (All) Export person data

In order to export the profile data of personal details, approvals, and personal education / training courses to PDF, the following steps should be performed:

1. Navigate to the “Edit person” page of a person.



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2. Click on the button: “PDF Preview”, which exists in the sticky row.

The PDF document of person’s data is generated and downloaded.

#### Notes:

- The “export of person data” refers to sections: “Details”, “Approvals”, “Educations” and “Trainings” of a person’s profile.
- The language of the exported PDF is always English.

Figure 23 – Person “PDF Preview” button

## 3.4 System role

### 3.4.1 (All) View “System roles” list

In order to view the “System roles” list, the following steps should be performed:

1. Navigate to the “Edit person” page of a person.
2. Navigate to “System roles” chapter.

The system presents the person's associated system roles in a table.

System roles ⓘ						
System role	Institute	Animal facility	Canton	Company	Role system access	Action
Animal Welfare Officer of Institute (AWOI)	Test institute 1		Zürich	Test company 1	✓	

Figure 24 – System roles

### 3.4.2 (RM, SDI, AWOI) Add system role

In order to add a system role, the following steps should be performed:

1. Navigate to the “Edit person” page of a person.
2. Navigate to “System roles” chapter.



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3. Click on the button: “Add system role”.

The system displays the pop-up window: “Add system role”, containing the system role creation form.

4. Fill-in at least all the mandatory fields.

5. Click on the button: “Save and close”.

The system checks for onboarding process.

If onboarding process has been identified, the system asks for confirmation of request.

6. In order to confirm, click on “Yes”.

Then, the system assigns a task to the AP to enable system access.

The new system role is saved in animex-ch and a confirmation message is displayed.

The edit profile page of the person is displayed.

Notes:

- As RM, you can assign / manage the following system roles in the same institute: SDI, IPI, and ASI.
- As SDI, you can assign / manage the following system roles only on your personal profile and in the same institute: IPI and ASI.
- As AWOI, you can assign / manage the following system roles in the same institute: SDI, IPI, and ASI.
- A system role (role + association with institute) can be added only once per person.

System role	Institute	Animal facility	Canton	Company	Role system access	Action
Animal Welfare Officer of Institute (AWOI)	Test institute 1		Zürich	Test company 1	✓	

Add system role

Figure 25 – “Add system role” button

Add system role

System role \*

Role system access ☐

Cancel Save and close

Figure 26 – “Add system role” pop-up window

### 3.4.3 (RM, SDI, AWOI) Edit system role

In order to edit a system role, the following steps should be performed:

1. Navigate to the “Edit person” page of a person.




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2. Navigate to “System roles” chapter.

3. In the table of “System roles”, under the column: “Action”, click on the “edit” icon: 

4. Edit the field: “System access”.

5. Click on “Save and close”.

The system checks for onboarding process.

If onboarding process has been identified, the system asks for confirmation of request.

6. In order to confirm, click on “Yes”.

Then, the system assigns a task to the AP to enable system access.

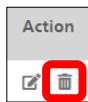
The updated system role is saved in animex-ch and a confirmation message is displayed.

The system displays the “Edit person” page.

### 3.4.4 (RM, SDI, AWOI) Delete system role

In order to delete a system role, the following steps should be performed:

1. Navigate to the “Edit person” page of a person.
2. Navigate to “System roles” chapter.
3. In the table of “System roles”, under the column: “Action”, click on the “Delete” icon:



of a table row (system role record).

The system asks for confirmation of request.

4. In order to confirm, click on “Yes”.

The system closes the pop-up window and deletes the system role.

The system displays the “Edit person” page.

#### Notes:

- When the last system role is removed, this person is automatically deactivated. After the deactivation, the user will not be retrievable (by default) in a person search and will not be selectable in new applications for animal experiment. Persons who are marked as deactivated are not, actually, deleted from the database. When a system role is removed from a person, then all notifications and archived notifications that are connected with the person via the removed system role are automatically deleted.
- When the last system role or last system role that has system access is removed and onboarding is in progress, the onboarding process is automatically interrupted.
- When the last system role is removed or onboarding is interrupted, the animex-ch system access option is automatically unchecked.
- When a system role is removed from a person, then all notifications and archived notifications



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cations that are connected with the person via the removed system role are automatically deleted.

- When an ASI system role is removed from a person and has active assignments (the person is selected by other users as administrative support replacement), a warning is displayed, to inform the user that all active assignments will be deleted, along with the system role.

### 3.4.5 (RM, SDI) Assign ASI system role

The ASI role is a “supportive” role, which gains access via the role it supports. An ASI user may substitute the roles of RM or SDI and has access to the same applications and resources as the “parent” role. The ASI role inherits all privileges from the “parent” role, apart from the submission of an application to the canton.

To add an administrative support role, follow the steps below:

1. Login as RM (or SDI).
2. Navigate to chapter: “System roles”, which exists on your own profile page. (This is accessible also through the corresponding hyperlink on the “Start page”).
3. For the system role of RM (or SDI), click on the “add supportive role” icon: , which exists under the “Action” column.

The system opens the pop-up window: “Add administrative support”.

4. In the drop-down list: “Person”, select a person with Administrative Support role.
5. Click on the button: “Add support role”.

#### Notes:

- In order to select a person with ASI role, this person needs to have the ASI role of this institute already assigned as their system role.
- As soon as an ASI role is selected, a sub-table under the selected system role will appear, for both the assignor (the RM or the SDI) and the assignee (ASI). An available option for this sub-table, is to delete this assignment (only the assignor person can remove the assignment).
- It is possible to assign an ASI user to several RMs and / or SDIs.
- No acceptance is needed from the ASI for their assignment.
- No notification is sent to the ASI for their assignment.
- As RM or SDI, you can assign an ASI as a replacement for only yourself.
- The ASI role always get the same tasks / notifications as their “parent” role.

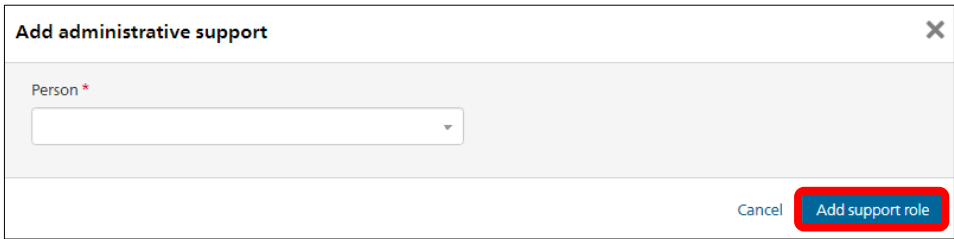


Figure 27 – “Add administrative support” pop-up window





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## 3.5 Approvals

The canton is responsible for setting an approval for a person's role. The approvals are individual for each canton. The presence of an approval is necessary for the system to calculate the required training days, as can be seen in chapter: ["3.5.1.1 Process diagram"](#).

### 3.5.1 Calculation of traffic light

The calculation of traffic light is performed according to:

- Accepted training days (ATD) of person
  - Approved by any canton
  - With attendance status: "Accepted"
  - With "Last attended date" within the last 4 years (from current date)
- Required training days (RTD) of first valid role approval
  - 0 to 4 days according to the first role approval

For more details, see the process diagram below:



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### 3.5.1.1 Process diagram

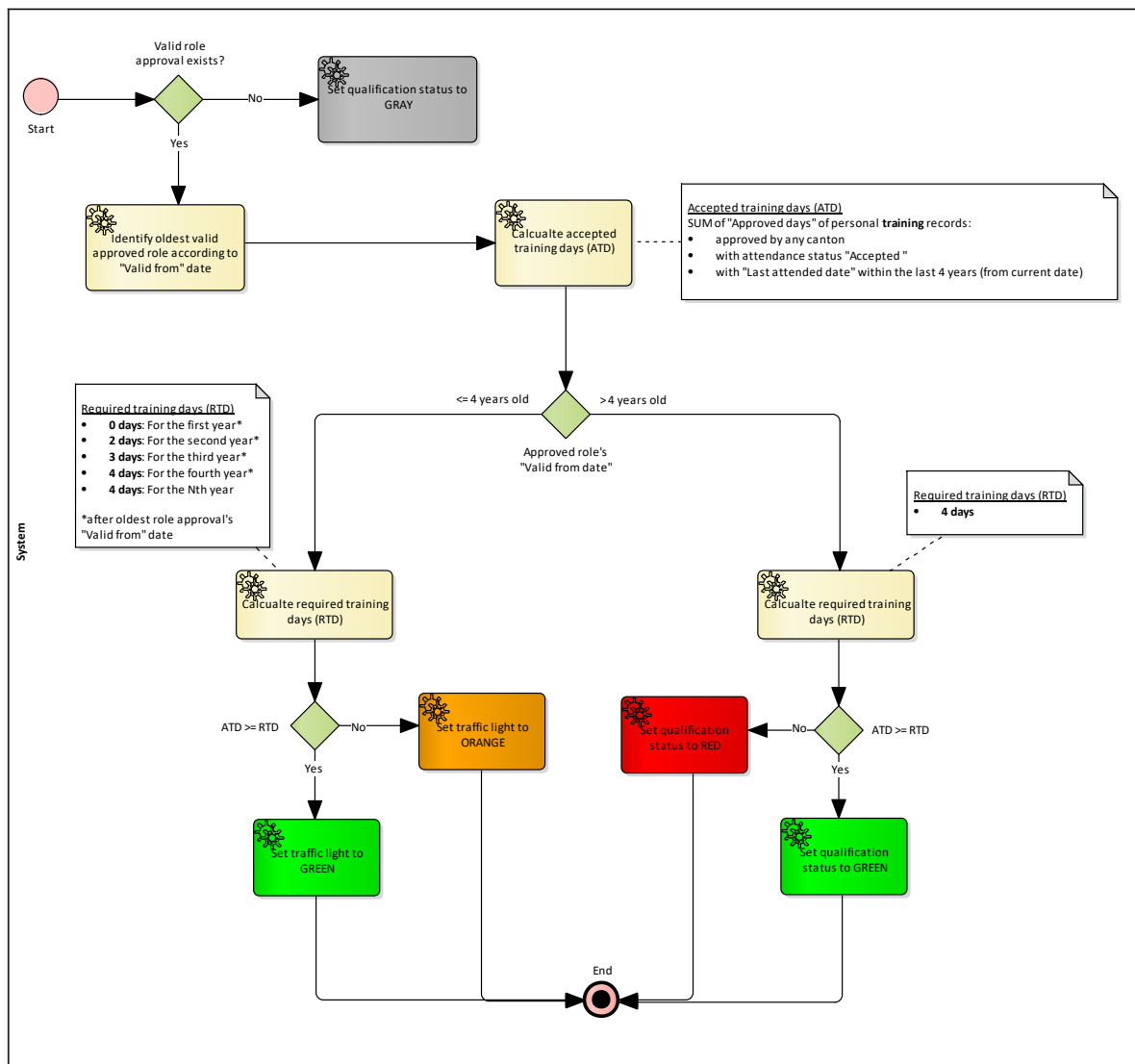


Figure 28 – Process diagram: Calculation of traffic light

### 3.5.2 (All) View “Approvals” list

In order to view the “Approvals” list, the following steps should be performed:

1. Navigate to the “Edit person” page of a person.
2. Navigate to “Approvals” chapter.

The system presents the person's associated approvals in a table.

**Note:** The “Approvals” list includes the column of “Severity”. This applies to the cases of approval for the role of ACT. Moreover, the columns: “Validity from” and “Validity to” describe the period for a valid role approvals. There is also the indication for “Training vacation”, which is informative.



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Approved role	Severity	Validity from	Validity to	Training vacation	Justification	Last modified date	Last modified by	Action
Resource Manager - ZH		25.04.2020				03.04.2020 16:38:05	First name Last name	

Figure 29 – Approvals

## 3.6 Personal educations & trainings

The process of personal courses' approval starts when a personal education / training course is added on the profile page and submitted to canton for personal approval. The CO can either approve or reject the corresponding education / training course. The CO has also the possibility to return the course back to the submitter for rewrite.

The pre-condition is that a course needs to be created and recommended in order to be possible to select it in the personal course section. (See chapter: "[4 Courses](#)".) Also, when a new personal course is created, then it is not visible or selectable for other users.

### 3.6.1 Educations

#### 3.6.1.1 (All) View personal "Educations" list

In order to view the personal "Educations" list, the following steps are needed:

1. Navigate to the "Edit person" page of a person.
2. Navigate to "Educations" chapter.

The system presents the person's associated education courses in a list.

Educations						
Title	Date	Attendance status	Responsible canton	Last updated by	Last updated on	Action
Education course 1	01.03.2020-31.03.2020	Accepted	Zürich	First name Last name	14.03.2020 16:09:58	
Education course 2	01.03.2020-31.03.2020	Submitted	Zürich	First name Last name	14.03.2020 16:11:30	

Figure 30 – Personal "Educations" list

#### 3.6.1.2 (All) Create personal education course

In order to create a personal education course, the following steps are needed:

1. Navigate to the "Edit person" page of a person.
2. Navigate to "Educations" chapter.
3. Click on the button: "Add education course".

The system displays the pop-up window: "Add personal education course".

The option: "Create new personal education course" is pre-selected.



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Alternative: Select the option: “Select education course” and search on the field: “Title / Year / Organizer”. (This field searches using “OR” operator and “contains” with minimum 2 characters. That means the title, the year, and / or the organizer of the course can be used for searching either autonomously or combined.) Then, click on the button: “Apply”.

The course form gets pre-filled based on the selected course.

4. Fill-in at least all the mandatory fields.
5. Click on the button: “Save and close”.

The pop-up window closes and the new education course has been added in the personal education courses list of that person.

#### Notes:

- A newly created course is stored always as “Active”: “Yes”. As course creator, you do not have the possibility to change this option.
- A created personal education course is not available for other users.
- In case of selecting an existing education course, only the active courses that are in status: “Approved” and that have access level: “Switzerland” are retrieved.

Educations						
Title	Date	Attendance status	Responsible canton	Last updated by	Last updated on	Action
Education course 1	01.03.2020-31.03.2020	Accepted	Zürich	First name Last name	14.03.2020 16:09:58	
Education course 2	01.03.2020-31.03.2020	Submitted	Zürich	First name Last name	14.03.2020 16:11:30	
<div>Add education course</div>						

Figure 31 – “Add education course” button

Add personal education course

Chapters

1 Course details

2 Course approval details

3 Attendance documents

Select education course

Create new personal education course

Title \*

Course details

Organizer \*

Event homepage

Address \*

Postal Code \*

Town \*

Course type

Submit to Canton

Cancel

Save and close

Save

Figure 32 – “Create new personal education course” option



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**Add personal education course**

☒ Select education course ☐ Create new personal education course

Select education course

**Title**

**Course details**

**Organizer**

**Event homepage**

**Address**

**Postal Code**

**Town**

Submit to Canton Cancel Save and close Save

Figure 33 – “Select education course” option

**Select existing education course**

Title/Year/Organizer \*

Cancel Apply

Figure 34 – “Select existing education course” pop-up window

### 3.6.1.3 Comments

A comment for a personal education course can be created during the submission of the personal education course for accreditation and in all the subsequent statuses.

#### 3.6.1.3.1 (All) View “Comments” list for personal education course

The “Comments” chapter appears after the submission of the personal education course for accreditation and in all the subsequent statuses.

1. Navigate to the “Edit person” page of a person.
2. Navigate to “Educations” chapter.
3. Select an education course.

The system displays the pop-up window: “Edit personal education course”.

4. Navigate to “Comments” chapter.



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The system displays the “Comments” list.

#### Notes:

- The comments appear in descending order (the newest received comment appears on the top of the list).
- Each comment consists of the following information: the personal education course attendance status (changed to), the author's system role, the author's institute name, the author's full name, the timestamp of creation (date and time).

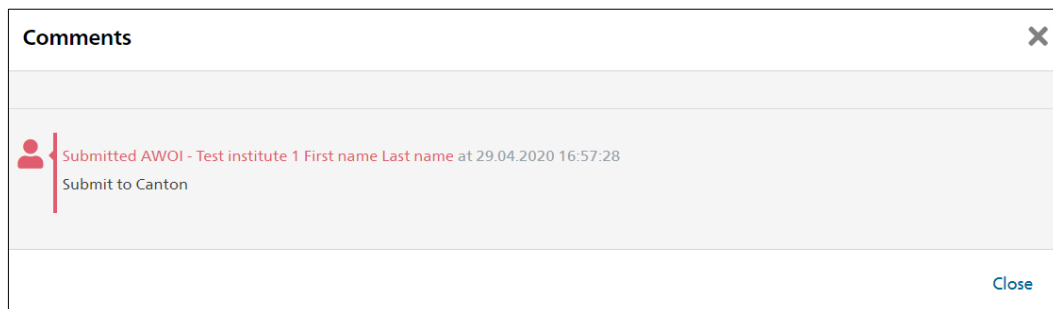


Figure 35 – “Comments” list for personal education course

#### **3.6.1.3.2 (All) Create comment for personal education course**

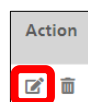
The creation of a new comment takes place as a step of the workflow of a personal education course approval process. The user is prompted to enter a comment before the attendance status of the personal education course changes to one of the following:


- Mandatory comments:
  - “Submitted” → “Returned for rewrite”
  - “Submitted” → “Not accepted”
- Optional comments:
  - “Draft” → “Submitted”
  - “Returned for rewrite” → “Submitted”
  - “Submitted” → “Accepted”

#### **3.6.1.4 (All) Edit selected / created education course**

In order to edit a selected (from existing education courses) education course or a newly created education course, the following steps are needed:

1. Navigate to the “Edit person” page of a person.
2. Navigate to “Educations” chapter.



3. Click on the “edit” icon: , which exists under the “Action” column of each table row.



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The system opens the pop-up window: "Edit personal education course".

4. Edit the desirable field(s).
5. Click on the button: "Save and close".

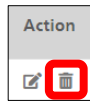
The system closes the pop-up window and the updated "Educations" list is displayed.


Note: A selected / created education course can be edited in the attendance statuses: "Draft", which means before the course is submitted to canton for approval. Also, it can be edited in the attendance statuses: "Returned for rewrite", which means after the course has been returned to the submitter for rewrite.

### **3.6.1.5 (All) Delete personal education course**

In order to delete a personal education course, the following steps are needed:

1. Navigate to the "Edit person" page of a person.
2. Navigate to "Educations" chapter.



3. Click on the "delete" icon: , which exists under the "Action" column of each table row.

The system asks for confirmation of request.

4. In order to confirm, click on "Yes".

The personal education course is deleted from the "Educations" list.

Note: A personal education course can be deleted, if the course access level is "Personal" and only before the personal course statuses: "Accepted" and "Not accepted".

### **3.6.1.6 (All) Submit personal education course to canton**

In order to submit a personal education course to the canton, the following steps are needed:

1. Navigate to the "Edit person" page of a person.
2. Navigate to "Educations" chapter.
3. Select a specific education record with status: "Draft".

The system opens the pop-up window: "Edit personal education course".

4. Click on the button: "Submit to canton".

The system opens a pop-up window for optional comment.

5. Insert a comment. (This step is optional.)

The system asks for confirmation of request.

6. In order to confirm, click on "Yes".

The personal education course is submitted to the canton.

The system displays a confirmation message.



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The pop-up window closes and the person's "Educations" list is updated.

#### Notes:

- After the attendance status of a personal education course changes to "Submitted", the system creates a task for the responsible COs.
- After the acceptance or rejection of the personal education course by the canton, the system creates a notification for the submitter of the course.

Figure 36 – "Submit to Canton" (personal education course)

## 3.6.2 Trainings

The process for personal training courses is the same as for the personal education courses. See chapter: ["3.6.1 Educations"](#).

The presence of a personal training course is necessary for the system to calculate the required training days, as can be seen in chapter: ["3.5.1.1 Process diagram"](#).

### 3.6.2.1 (All) View personal "Trainings" list

See chapter: ["3.6.1.1 \(All\) View personal "Educations" list"](#).





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Trainings						
Title	Date	Attendance status	Responsible canton	Last updated by	Last updated on	Action
Training course 1	01.03.2020-31.03.2020	Accepted	Zürich	First name Last name	14.03.2020 16:18:12	
Training course 2	01.03.2020-31.03.2020	Submitted	Zürich	First name Last name	14.03.2020 16:18:34	

Figure 37 – Personal “Trainings” list

### 3.6.2.2 (All) Create personal training course

See chapter: [“3.6.1.2 \(All\) Create personal education course”](#).

### 3.6.2.3 Comments

See chapter: [“3.6.1.3 Comments”](#).

#### 3.6.2.3.1 (All) View “Comments” list for personal training course

See chapter: [“3.6.1.3.1 \(All\) View “Comments” list for personal education course”](#).

#### 3.6.2.3.2 (All) Create comment for personal training course

See chapter: [“3.6.1.3.2 \(All\) Create comment for personal education course”](#).

#### 3.6.2.4 (All) Edit selected / created personal training course

See chapter: [“3.6.1.4 \(All\) Edit selected / created education course”](#).

#### 3.6.2.5 (All) Delete personal training course

See chapter: [“3.6.1.5 \(All\) Delete personal education course”](#).

#### 3.6.2.6 (All) Submit personal training course to canton

See chapter: [“3.6.1.6 \(All\) Submit personal education course to canton”](#).

## 3.7 Authorizations in personal profile

The chapter: “Authorizations” contains the valid licenses related to a person. This means the valid licenses where the person is declared in the personnel of the corresponding Form A and the application has one of the following statuses: “Approved”, “Approved on hold”, or “Appealed”. Both conditions must be true, in order for the license to be displayed.



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### 3.7.1 (All) View “Authorizations” list

The “Authorizations” list can be viewed as follows:

1. Navigate to the “Edit person” page of a person.
2. Navigate to “Authorizations” chapter.

The system displays the valid licenses, which are associated to a specific person.

#### Notes:

- If you are logged-in as AWOI and navigate to an “Edit person” page, you can see: All the valid licenses of that person that are associated with the AWOI's institutes.
- If you are logged-in as RM and navigate to an “Edit person” page, you can see: All the valid licenses of that person that are associated with the RM's institutes and where you are declared as RM in the personnel of the corresponding application.
- If you are logged-in as SDI, you can navigate only to your own “Edit person” page. There you can see: All your valid licenses, which are associated with the SDI's institutes.
- If you are logged-in as IPI, you can navigate only to your own “Edit person” page. There you can see: All your valid licenses, which are associated with the IPI's institutes.

Authorizations ⓘ								
National number	Cantonal number	Title	Study director	Role in experiment	Name of the institute	Status	Valid from	Valid until
32154	ZH01/2020	Test application 1	First name Last name	Resource Manager (RM) , Study Director of Institute (SDI)	Test institute 1	Approved	29.04.2020	20.05.2020

Figure 38 – “Authorizations” list in personal profile

### 3.7.2 (All) Documents

The addition of documents for a person can be executed from three different main areas:

- The “**Documents**” chapter, which exists on the left navigation menu of “Edit person” page. (Document type: “Person” level) The functionality is described in chapter: [“2.13 Documents”](#).
- The “**Education**” courses chapter, which exists on the left navigation menu of the “Edit person” page. (Document type: “Education” level)
- The “**Training**” courses chapter, which exists on the left navigation menu of the “Edit person” page. (Document type: “Training” level)

Only documents with “Type”: “Person” can be edited and deleted from within the “Documents” chapter of “Edit person” page. All other types are managed from within their corresponding “source” (e.g., education / training courses, etc.).



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Documents

10 per page

Total: 3 Entries

Previous 1 Next

Download as ZIP Export

TYPE	NUMBER	FORMAT	TITLE	DESCRIPTION	FILENAME	SIZE KB	DATE	USER	ACTION
Person		DOCX	Person details.docx	Person details	Person details.docx	0	29.04.2020 16:54:23	First name Last name	
Education		DOCX	Personal education course.docx	Personal education course	Personal education course.docx	0	29.04.2020 16:54:48	First name Last name	
Training		DOCX	Personal training course.docx	Personal training course	Personal training course.docx	0	29.04.2020 17:06:43	First name Last name	

+ Add Documents

Close

Figure 39 – “Documents” list in personal profile



## 4 Courses

The difference of “general” courses from the personal courses is that a course needs to be created and recommended in order to be possible to select it in the personal course section. (See chapter: [“3.6 Personal educations & trainings”](#).)

### 4.1 Search

#### 4.1.1 (All) Search course

In order to search for a course (education or training), the following actions should be performed:

1. Navigate to main navigation menu: “Courses”.  
The system displays the “Search courses” page.
2. Adjust the search by using one of the tabs: “Full-text”, “Course”, or “Extended search”.  
When selecting a tab for search, the search criteria in the other tabs are cleared.
3. Click on the button: “Search”.

#### Notes:

- The search criteria with free text input are used to perform a search in all parts of a field value (“contains” search). For instance, when a search is performed by entering “**Educa-tion**” in the search field: “Title”, the system searches for all courses that contain “**Educa-tion**” in their course title. This would retrieve the “Title”: “Education course”, because it contains the value.
- In each search criterion field, where text or number characters are entered at least 3 characters must be entered in order to perform the search. For instance, if a search in the search field: “Organizer” or in the full-text search field needs to be performed at least 3 characters must be entered in the corresponding search field.  
The individual search criteria selected by the user are linked with the operator: “AND”.  
Example: If a search is performed with the following criteria:  
- “Title”: “123456”  
- “Town”: “Bern”  
Only the courses that meet both criteria will be retrieved, which means that all the courses with “Title”: “123456” AND “Town”: “Bern”, will be retrieved from the database.
- When the “Clear” button is clicked:
  - The radio button groups are set to “Both”.
  - The checkboxes of “Accreditation for” are all reset to their initial value (which is to be checked).
  - All other search filters are cleared.
- When searching using detailed search fields, the system performs “exact match” search with “contains”. The system matches the same characters containing umlauts: a, o, u, as well.
- When searching using full-text search, the system performs phonetic (fuzzy) search. The fuzzy matching allows to identify non-exact matches of a target item. This means that relevant search results can be retrieved, even if there is a typo or a different verbal tense in the word used in the full-text search.  
Example: If a full-text search is performed with “Jon”, then the system will retrieve results that sound similar to “Jon”, e.g., the system will retrieve “John” as well.



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Figure 40 – Search course

## 4.1.2 (All) View “Courses” list

In order to view the search results list, the following actions should be performed:

1. Navigate to main navigation menu: “Courses”.  
The system displays the “Search courses” page.
2. Adjust the search by using one of the tabs: “Full-text”, “Course”, or “Extended search”.  
When selecting a tab for search, the search criteria in the other tabs are cleared.
3. Click on the button: “Search”.

### Notes:

- The search results are displayed in a table with default and optional columns, positioned below the search criteria.
- In order to view the hidden optional columns, click on the button: “More columns”, which is displayed on the right side, above the search results table. This button triggers a drop-down with a list of checkboxes. All the checkboxes that get checked, appear in the search results table as columns.
- Each course may be associated with a list of durations (“From – “To” dates). When such a course is retrieved in the search results, multiple rows may be displayed for the same course (each row will represent a different from / to date range of the same course).



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The screenshot shows the 'Courses' list page in the animex-ch system. The page has a header with the Swiss Confederation logo and the text 'animex-ch'. Below the header is a navigation bar with links: 'Start page', 'Tasks, notifications and open forms', 'Animal Experiments', 'Person', and 'Courses'. The 'Courses' link is active. Below the navigation bar is a search bar with the text 'Search course'. To the right of the search bar is a button 'Create training course'. Below the search bar is a form with fields for 'Title', 'Course date', 'Organizer', and 'Type'. The 'Type' field has radio buttons for 'Education', 'Training', and 'All'. Below the form is a button 'Advanced Search'. Below the form is a table with the following data:

TITLE	ORGANIZER	YEAR	FROM DATE	TO DATE	COURSE TYPE	DAYS FOR STUDY DIRECTOR, ANIMAL WELFARE OFFICER	DAYS FOR HEAD ANIMAL FACILITY	DAYS FOR INVOLVED PERSON	DAYS FOR COMMISSION MEMBER	DAYS FOR ANIMAL CARE TAKER
Test training course 1	Organizer	2020	01.04.2020	30.04.2020	Training	5	5	5	10	4.5
Test training course 1	Organizer	2020	01.04.2020	30.04.2020	Training	5	5	5	10	5

At the bottom of the page, there is a footer with the text 'Federal Food Safety and Veterinary Office' and 'User Support Legal Framework Impressum v0.6.3.3-SNAPSHOT-334c9bd'.

Figure 41 – “Courses” list

## 4.2 Details

### 4.2.1 Sticky row

The sticky row is a fixed row that is displayed permanently, when scrolling down a course page is performed. It contains the following items:

- Process steps visualization. See chapter: [“4.2.2 \(All\) Process steps visualization for education course”](#) and [“4.2.3 \(All\) Process steps visualization for training course”](#).
- Course title
- The buttons:
  - Export to PDF: See chapter: [“4.2.5 \(All\) Export education / training course approval to PDF format”](#)
  - Delete: See chapter: [“4.2.4.3 \(All\) Delete training course”](#)
  - Save
  - Submit for accreditation: See chapter: [“4.2.4.4 \(All\) Submit training course to Main Course Accreditor or to Canton Operator”](#).

### 4.2.2 (All) Process steps visualization for education course

In order to view the process steps, a specific education course should be opened. For this, a search is possible to be performed. (See chapter: [“4.1.1 \(All\) Search course”](#)).

The process steps visualization refers to the presentation of the process steps of an education course in the sticky row. Its goal is to provide a quick overview of each course approval status.



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The only step that will be visible is the step marked with blue colour in status: “Approved”. This is due to the fact that the institute users can only view the education courses that are in status: “Approved”.

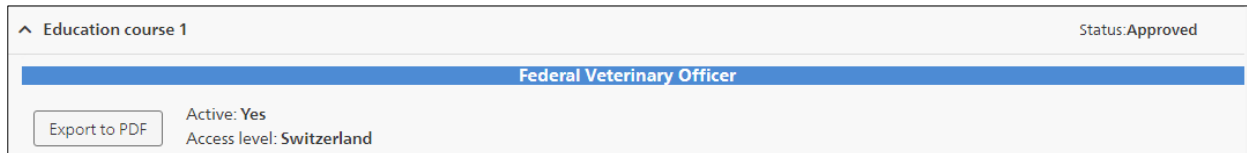




Figure 42 – Process steps visualization for education course

### 4.2.3 (All) Process steps visualization for training course

In order to view the process steps, a specific training course should be opened. For this, a search is possible to be performed. (See chapter: [4.1.1 \(All\) Search course](#)).

The process steps visualization refers to the presentation of the process steps of a training course in the sticky row. Its goal is to provide a quick overview of each course status and of the next steps.

The process steps are presented as follows:

- Step: “Institute / Canton”: By hovering over the tooltip icon: , which exists beside “Creator”, their name and their contact information are displayed. This step is marked with red colour in statuses: “Draft” and “Returned for rewrite”.
- Step: “VSKT / Canton” with the label: “MCA / Cantonal Veterinary Officer”, underneath. There is a tooltip icon only for the “Canton” case. By hovering over the tooltip icon: , which exists beside “Cantonal Veterinary Officer”, their contact information are displayed. This step is marked with red colour in status: “Submitted”.
- The steps: “Institute / Canton” & “VSKT / Cantonal Veterinary Officer” are marked with blue colour in status: “Recommended” and with gray colour in status: “Not recommended”.

**Note:** The personal details displayed on step: “Institute / Canton” are, dynamically, populated, when the corresponding field is selected and saved in the training course form.



Figure 43 – Process steps visualization for training courses with “Access level”: “Switzerland”



Figure 44 – Process steps visualization for training courses with “Access level”: “Institute”

### 4.2.4 Training courses

The process for training courses starts when you create a new training course and submit it either to the Main Course Accreditor (MCA) or to the CO for approval. To whom the personal



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training course is submitted depends on the access level of the training course. In case the “Access level” is “Switzerland”, the course is submitted to the MCA for accreditation. The MCA can request a statement from the Secondary Course Accreditor (SCA), return the training course to the submitter for rewrite, or recommend / not recommend the training course.

On the other hand, in case the “Access level” is “Institute”, the course is submitted to the CO associated with the creator group and the CO can only recommend / not recommend the training course.

#### Notes:

- Multiple “From – To” dates can be added in field: “Duration”, if a repeated course is needed. These dates can be within one year and not between several years.
- The section: “Accredited days” should be filled-in with the number of days accredited for the SDI and the AWOI, the IPI, HAF, the CM, and the ACT.

Figure 45 – “Create training course” page

#### **4.2.4.1 (All) Create training course**

In order to create a new training course, execute the next steps:

1. Navigate to main navigation menu: “Courses”.
2. Click on the button: “Create training course”.

The system presents the page: “Add training course”.

3. Fill-in at least all the mandatory fields.
4. Click on the button: “Save and create”.

The system displays a confirmation message.

The system remains on the edit page of the training course.





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#### **4.2.4.2 (All) Edit training course**

A training course can be edited as described below:

1. Navigate to main navigation menu: "Courses".

The system displays the "Search courses" page.

2. Adjust the search by using one of the tabs: "Full-text", "Course", or "Extended search".  
When selecting a tab for search, the search criteria in the other tabs are cleared.

3. Click on the button: "Search".

The search results are displayed in a table positioned below the search criteria.

4. Select a training course that is in status: "Draft" or "Returned for rewrite".

The system opens the "Edit training course" page.

5. Edit the desirable field(s).

6. Click on the button: "Save".

The system displays a confirmation message.

Note: In order to edit a training course, the "Creator group" must be "Institute" and the training course status must be "Draft" or "Returned for rewrite".

#### **4.2.4.3 (All) Delete training course**

A training course can be deleted as given below:

1. Navigate to "Edit training course" page.

2. Click on the button: "Delete", which exists in the sticky row.

The system asks for confirmation of request.

3. In order to confirm, click on "Yes".

The system closes the pop-up window and deletes the training course.

The system displays the "Search courses" page.

#### Notes:

- A training course can be deleted, only if its status is "Draft" or "Returned for rewrite".
- In case a training course is deleted in status: "Returned for rewrite", the system sends a notification to the MCAs or to the COs.



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Figure 46 – “Delete” training course button

#### 4.2.4.4 (All) Submit training course to Main Course Accreditor or to Canton Operator

The submission of a training course depends on the “Access level” of the course.

In case the “Access level” is “Switzerland”, the course is submitted to the Main Course Accreditor for accreditation.

In case the “Access level” is “Institute”, the course is submitted to the CO for approval.

In order to submit a training course, the following steps should be performed:

1. Navigate to “Edit training course” page.
2. Click on the button: “Submit for accreditation”, which exists in the sticky row.

The system presents the pop-up window: “Submit training course”, where an optional comment can be inserted.

3. Click on the button: “Submit for accreditation”.

The system asks for confirmation of request.

4. In order to confirm, click on “Yes”.

The system closes the pop-up window and submits the course for accreditation.

The system displays a confirmation message.

The system displays the training course page as non-editable.

**Note:** The button: “Submit for accreditation” is displayed, when the training course status is “Draft” or “Returned for rewrite”.



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Figure 47 – “Submit for accreditation” to MCA button

Figure 48 – “Submit for accreditation” to canton button

#### 4.2.4.5 Comments

A comment for a training course can be created during the submission of the training course for accreditation and in all the subsequent statuses.



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#### 4.2.4.5.1 (All) View “Comments” list for training courses

The “Comments” chapter appears after the submission of the training course for accreditation and in all the subsequent statuses.

The “Comments” list for training courses can be seen as described below:

1. Navigate to “Edit training course” page.
2. Navigate to chapter: “Comments”.

The system opens the “Comments” pop-up window with the comments list appearing in descending order (the newest received comment appears on the top of the list).

Note: Each comment consists of the following information: the training course status (changed to), the author's system role, the author's institute name, the author's full name, the timestamp of creation (date and time).

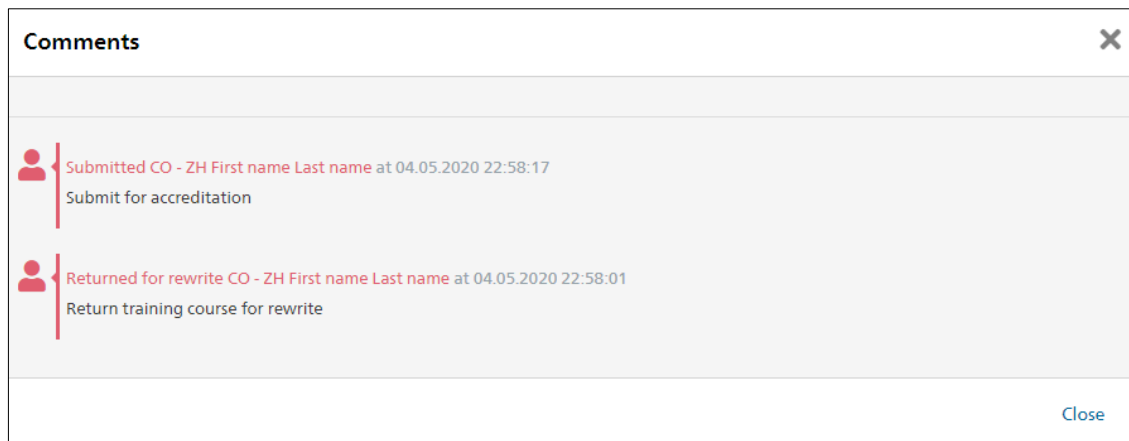


Figure 49 – “Comments” list for training courses – Course creator: Canton user



Figure 50 – “Comments” list for training courses – Course creator: Institute user



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#### 4.2.4.5.2 (All) Create comment for training course

The creation of a new comment takes place as a step of the workflow of a training course approval process. The user is prompted to enter a comment before the status of the training course changes to one of the following:

- Mandatory comments:
  - “Submitted” → “Returned for rewrite”
  - “Submitted” → “Not recommended”
- Optional comments:
  - “Draft” → “Submitted”
  - “Returned for rewrite” → “Submitted”
  - “Submitted” → “Recommended”

Figure 51 – Example of optional comment for training courses (status change from “Draft” → “Submitted”)

#### 4.2.5 (All) Export education / training course approval to PDF format

1. Navigate to “Edit education / training course” page of a person.
2. Click on the button: “Export to PDF”, which exists in the sticky row.

The PDF document of the course approval is generated and downloaded.

##### Notes:

- The language of the exported course approval depends on the pre-selected animex-ch language.
- A training course must be either recommended or not recommended, in order for the button: “Export to PDF” to be displayed.



## 5 Application for animal experiment

An application for animal experiment can be created at institute level by a SDI, a RM, an AWOI, or an IPI. Only an AWOI can submit the application to the canton. The CO has the option to return the application back to the institute for rewrite or make questions and send them to the institute. The CO can also invite a CM and / or secondary CO for Commission statement. After the Commission statement, the CO can decide on this application by either approving or disapproving it.

### 5.1 Process diagram

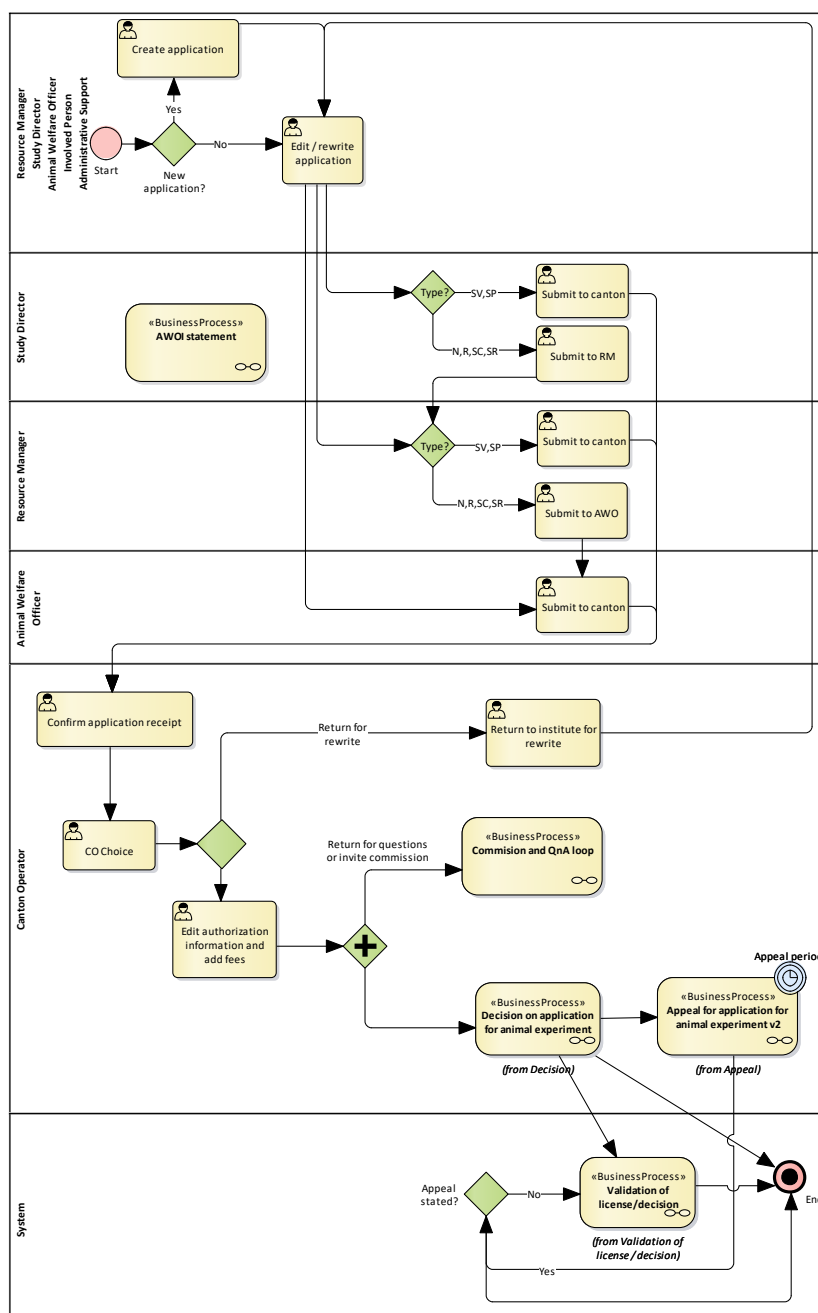


Figure 52 – Process diagram: Application for animal experiment



## 5.2 Status diagram

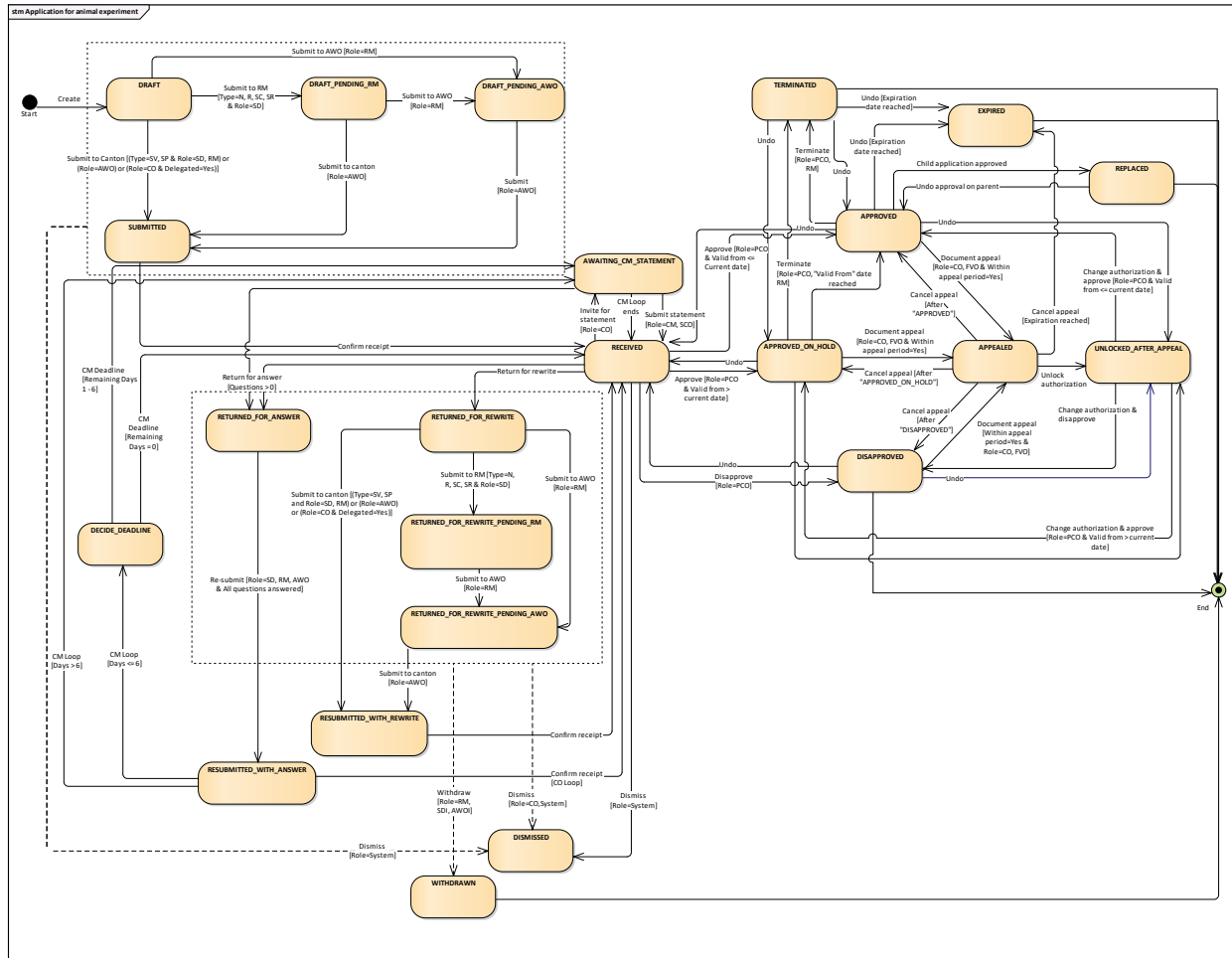


Figure 53 – Status diagram: Application for animal experiment

## 5.3 Search

### 5.3.1 (All) Search application

In order to search for applications for animal experiment, the following actions should be performed:

1. Navigate to main navigation menu: “Animal Experiments”.
2. Select “Applications for animal experiments”.

The system displays the search page of applications for animal experiments.

3. Adjust the search by using one of the tabs: “Full-text”, “Application number”, or “Extended search”. When selecting a tab for search, the search criteria in the other tabs are cleared.
4. Click on the button: “Search”.



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## Notes:

- The search criteria with free text input are used to perform a search in all parts of a field value ("contains" search). For instance, when a search is performed by entering "456" in the search field: "Application number", the system searches for all "Application numbers" that contain "456". This would retrieve the application with "Application number": "123**456**7", because it contains the value.
- In each search criterion field where text or number characters are entered at least 3 characters must be entered in order to perform the search.
- The inactive master data entries are not included in the selection criteria.
- The selected individual search criteria are linked with the operator: "AND".  
Example: If a search is performed with the following criteria:
  - "Application number": "123456"
  - "Canton": "BE"Then, only the applications that meet both criteria will be retrieved, which means that all applications with "Application number": "123456" AND "Canton": "Bern", will be retrieved from the database.
- The search criteria that allow multiple selected values on the same field are linked with the operand "OR".  
Example: If a search is performed with the following criteria:
  - "Application type": "Renewal", "Supplementary Application"Then, the applications that are either of type "Renewal" OR "Supplementary Application" will be retrieved.
- When the button: "Clear" is clicked:
  - The top checkboxes of each tab ("Select all", "Draft", "Pending", "Valid", "Invalid") are not affected. They "keep" the values, which were last used. More specifically, there are the following status groups:
    - "Draft": It refers to the statuses: "Draft", "Draft pending RM", "Draft pending AWOL", "Returned for rewrite", "Returned for rewrite pending RM", "Returned for rewrite pending AWOL", and "Returned for answer".
    - "Pending": It refers to the statuses: "Submitted", "Received", "Awaiting CM statement", "Decide deadline", "Resubmitted with rewrite", "Resubmitted with answer", "Appealed", and "Unlocked after appeal".
    - "Valid": It refers to the statuses: "Approved" and "Approved on hold".
    - "Invalid": It refers to the statuses: "Disapproved", "Expired", "Replaced", "Terminated", "Withdrawn", and "Dismissed".
  - The radio button groups are set to "Both".
  - All other search filters are cleared.
- When searching using detailed search fields, the system performs "exact match" search with "contains". The system matches the same characters containing umlauts: a, o, u, as well.
- When searching using full-text search, the system performs phonetic (fuzzy) search. The fuzzy matching allows to identify non-exact matches of a target item. This means that relevant search results can be retrieved, even if there is a typo or a different verbal tense in the word used in the full-text search.  
Example: If a full-text search is performed with "Jon", then the system will retrieve results that sound similar to "Jon", e.g., the system will retrieve "John" as well.





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Figure 54 – Search application for animal experiment

Figure 55 – Search application for animal experiment (extended search)

### 5.3.2 (All) View search results list

In order to view the search results list, the steps described in chapter: [“5.3.1 \(All\) Search application”](#) have to be executed.

#### Notes:

- The search results are displayed in a table with default and optional columns, positioned below the search criteria.
- In order to view the hidden optional columns, click on the button: “More columns”, which is displayed on the right side, above the search results table. This button triggers a drop-down with a list of checkboxes. All the checkboxes that get checked, appear in the search results table as columns.



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Application Search - Animal Experiments

Full-text Application number Extended search

Select all ☐ Draft ☒ Pending ☒ Valid ☒ Invalid ☐

Full-text Search: 32388

10 per page

Total: 1 Entries

NATIONAL NUMBER ^	CANTONAL NUMBER	TITLE OF THE APPLICATION	RESOURCE MANAGER	INSTITUTE	APPLICATION TYPE	STATUS	INTERCANTONAL
32388	ZH10/2020	Test application 1	First name Last name	Test institute 1	New Application	Returned for rewrite	No

Federal Food Safety and Veterinary Office

User Support Legal Framework Impressum v0.6.3.19-SNAPSHOT-1386745

Figure 56 – “Applications” list

### 5.3.3 (All) Sticky row

The sticky row is a fixed row that is displayed permanently, when scrolling down a Form A is performed. It contains the following items:

- Process steps visualization. See chapter: [“5.3.4 \(All\) Process steps visualization”](#).
- National number
- Cantonal number
- Title of application
- Type: It refers to the field: “Application type”.
- Status: It refers to the application status.
- Situation: The system automatically calculates and displays the current milestone. The possible milestones are the following: “In progress”, “Approved in last week”, “Expires within 3 months”, “Valid”, and “Invalid”.
- Expires: The date is automatically taken from the Form AB.
- The buttons:
  - Create. It is used to create another application type. See chapters: [“5.6 \(All\) Create \[SC\] Supplementary application”](#), [“5.7 \(All\) Create \[SP\] Personnel supplementary application”](#), [“5.8 \(All\) Create \[SR\] Personnel supplementary application for Resource Manager or Principal Study Director”](#), and [“5.9 \(All\) Create \[SV\] Extension of validity supplementary application”](#).
  - AWOI lock: It is displayed only for the AWOI. When it is clicked, the Form A is editable only by the AWOI and is locked for editing for other users.
  - PDF: See chapters: [“5.12 \(All\) Export Form A to PDF format”](#).
  - Save: It is used to save the application.




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- Validate: It is used to validate the application.
- Send to RM: See chapter: "[5.16 \(SDI, AWOI\) Send application](#) to RM".
- Send to AWOI: See chapter: "[5.18 \(RM, SDI\) Send application](#) to AWOI".
- Sign and submit: See chapter: "[5.19 \(RM, SDI, AWOI\) Submit application to \(primary\) canton](#)".
- A list of sub-elements, which are visible only once relevant by clicking on the icon: .
  - The sub-element: Delete. See chapter: "[5.14 \(All\) Delete application](#)".
  - The sub-element: Compare. See chapter: "[5.11 \(All\) Compare application](#)".
  - The sub-element: "License / Decision". It is visible after the primary canton's decision.
  - The sub-element: "Reports"
  - The sub-element: "Versions"
  - The sub-element: "Inspections"

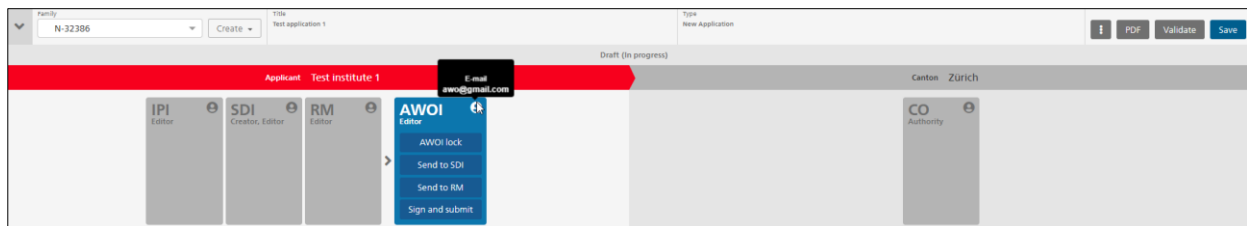




Figure 57 – Form A sticky row (Form A created by AWOI and in status: "Draft")

### 5.3.4 (All) Process steps visualization

In order to view the process steps, an application for animal experiment should be opened. For this, a search is possible to be performed. (See chapter: "[5.3.1 \(All\) Search application](#)"). The process steps are available by clicking on the arrow beside the "Family" indication.

The process steps visualization refers to the presentation of the process steps of an application for animal experiment in the sticky row. (See chapter: "[5.3.3 \(All\) Sticky row](#)".) Its goal is to provide a quick overview of the current application status and of the next steps.

The process steps are presented as follows:

- Step: "Institute": The institute name is displayed inside the arrow. By hovering over the tooltip icon: , which exists beside "IPI", "SDI", "RM", and "AWOI", their name and their contact information is displayed. This step is marked with red colour in statuses: "Draft", "Draft pending RM", "Draft pending AWOI", "Returned for rewrite", "Returned for rewrite pending RM", "Returned for rewrite pending AWOI", and "Returned for answer".
- Step: "Canton": The canton name is displayed inside the arrow. By hovering over the tooltip icon: , which exists beside "CO", their contact information is displayed. This step is marked with red colour in statuses: "Submitted", "Received", "Resubmitted with rewrite", "Resubmitted with answer", "Awaiting CM statement", and "Unlocked after appeal".



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The steps: “Institute” & “Canton” are marked with blue colour in statuses: “Approved” and “Approved on hold”, with orange colour in status: “Appealed”, and with gray colour in statuses: “Disapproved”, “Expired”, “Replaced”, “Terminated”, “Withdrawn”, and “Dismissed”.

Note: The personal details displayed on each step are, dynamically, populated, when the corresponding fields are selected in the application form.

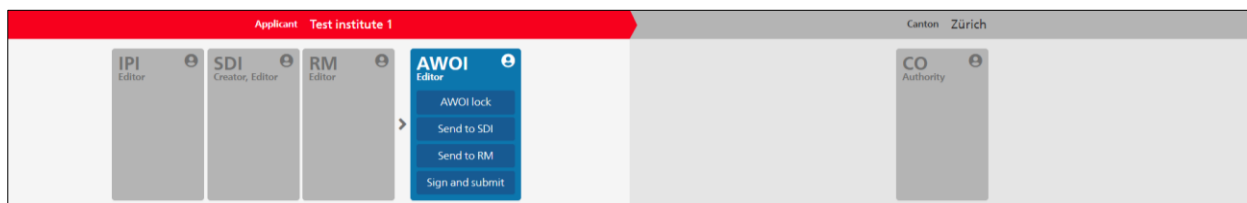


Figure 58 – Form A process steps visualization: application at institute level

### 5.3.5 (All) “Family”

The “Family” of an animal experiment contains all applications that have been created for a specific animal experiment, along with several elements for each application. It is displayed on the view and edit pages of an application for animal experiment.

The “Family” of an animal experiment is presented on the sticky row of Form A and contains the applications that belong in the same “Family”. Each application displays:

The application identifier: {Application type code}-{National no}-{Cantonal no}/{YY}. When the application is in status: “Draft”, only the first 2 values are displayed. After it is received from the canton, the full identifier is displayed. The {YY} placeholder refers to the year that the application is created. The current valid application (application holding the valid license) is indicated with a green checkmark next to the identifier number.

#### Notes:

- All applications on a “Family” are presented in descending chronological order, based on the application creation date.
- When an application tab (on the “Family” menu) is clicked, the corresponding application is loaded.

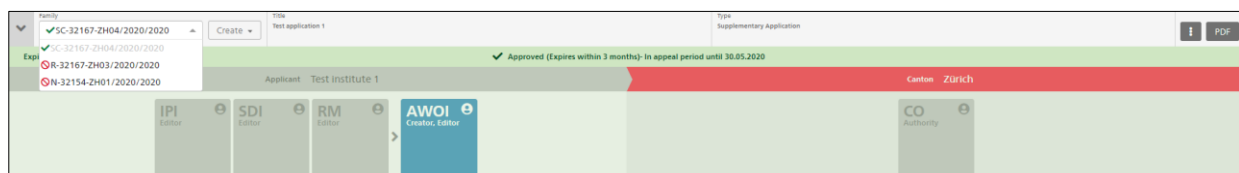


Figure 59 – Form A “Family”

- Validation indication

When clicking on the “Validate” button, the system validates the application. When validation errors occur they are indicated in the chapters of the left navigation menus and inside the Form A:



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Figure 60 – Validation errors indication

## 5.4 (All) Create [N] New application

A new (root) application can be created by following the steps below:

1. Navigate to main navigation menu: “Animal Experiments”.
2. Select “Applications for animal experiments”.

The system displays the search page of applications for animal experiments.

3. Click on the button: “New application for animal experiment (Form A)”.

The system presents a wizard page, which guides to select the fields which are mandatory in order to create and save a “Draft” application: the “Name of the institute”, the “Resource Manager”, the “Study Director”, the “Cantonal authority”, and the creator “Role”.

4. Fill-in at least all the mandatory fields.

The field “Delegated application input” is automatically set by the system to “No (System)”.

5. Click on the button: “Save and create”.

The system validates the form and if the validation is successful, it saves the application, it assigns a new national number to it and redirects to the edit page of Form A.

### Notes:

- For the fields: “Resource Manager”, “Study Director”, and “Role”:
  - A warning is displayed, when the system role does not have a corresponding approved role, but it does not block the process of creating a new application. This warning persists until the application reaches a decision (application status: “Approved”, “Approved on hold”, or “Disapproved”).
  - A warning is displayed, when the user has the corresponding approved role, but the approval has expired. Again, it does not block the process of creating a new



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application. This warning persists until the application reaches a decision (application status: “Approved”, “Approved on hold”, or “Disapproved”).

- If you are logged-in as SDI or IPI, in the field: “Role”, only the current logged-in role is available for selection. It is a mandatory field, if:
  - You are not already selected as “Resource Manager” and
  - You are not already selected as principal “Study Director” and
  - You are not logged-in as an AWOI in the institute declared in the field: “Name of the institute”.

Figure 61 – “New application for animal experiment (Form A)” button

Figure 62 – Form A wizard page

## 5.5 (All) Create [R] Renewal application

A renewal application can be created by following the steps below:

1. Navigate to main navigation menu: “Animal Experiments”.



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2. Select “Applications for animal experiments”.

The system displays the search page of applications for animal experiments.

3. Search for an application of any type that is in application status: “Approved”, “Approved on hold”, or “Expired”.
4. Select an application of any type that is in application status: “Approved”, “Approved on hold”, or “Expired”.

The system redirects to the page of Form A.

5. Click on the button: “Create”, which exists in the sticky row. (See chapter: [“5.3.3 \(All\) Sticky row”](#).)
6. Select the option: “[R] Renewal application”.

The system asks for confirmation of request.

7. In order to confirm, click on “Yes”.

The system displays the Form A fields pre-filled with default values.

8. Fill-in the editable fields.
9. Click on the button: “Save”.

**Alternative:** Click on the button: “Validate”, in order to validate the form. When the validation is performed via the “Validate” button, the system automatically scrolls to the field identified with a validation error.

The system validates the form and if the validation is successful, a message of successful validation is displayed. In addition, the system rere-direcdirects to the edit page of Form A.

#### Notes:

- A [R] takes over all Form A fields and the documents of these fields. All fields, apart from the “2 Address of the cantonal authority” field can be updated, when editing a renewal application.
- A [R] can be created for any application type ([N], [R], [SC], [SV], [SP], and [SR]).
- A [R] gets a new national number.
- A [R] application can be created, only when the “parent” application is in status: “Approved”, “Approved on hold”, or “Expired”.
- A [R] can be created starting 6 months before the expiration of the “parent” application license (starting 6 months before the date declared in the “Application valid to” field of the “Authorization” chapter.
- Parallel applications are not allowed. In order to create a [R], the “parent” must not have another [R], [SC], [SV], [SP], or [SR] in the following status groups: “Draft” and “Pending”, with exception to statuses: “Decide deadline”, “Appealed”, and “Unlocked after appeal”. (For the description of the status groups, see chapter: [“5.3.1 \(All\) Search application”](#).)
- None to many [R] can be created in a “Family”.
- Rich-text editor fields:
  - When creating a [R] as a “child” of a [N], the system automatically concatenates a separator / header text above the previous [N] rich-text fields. These fields are editable.
  - When creating a [R] as a “child” of a [SC], the system automatically concatenates



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(merges) the previous [SC] rich-text fields and their “parent” fields with a separator / header text in between. These fields are editable.

- When creating a [R] as a “child” of a [R], [SP], [SV], or [SR], the system automatically inherits previous rich-text fields from the “parent” application. These fields are editable.

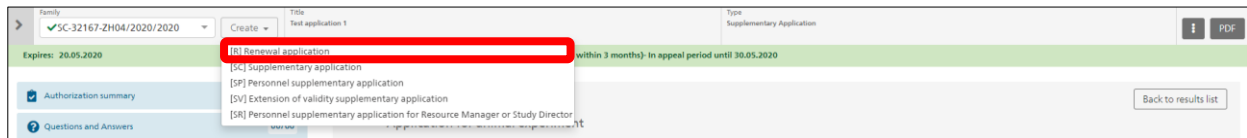


Figure 63 – Create [R] Renewal application

## 5.5.1 Animals

### 5.5.1.1 (All) Add animal category

This section describes the addition of an animal category “card\*” and all its associated information in the section: “Animals” of Form A.

In order to add an animal category, the next steps should be followed:

1. Open an editable Form A.
2. Navigate to section: “Animals”, in chapter: “09 Animal List”.
3. Click on the button: “Add animal category”.

The system opens a pop-up window, containing a form.

4. Fill-in at least all the mandatory fields. (See chapters: [“5.5.1.1.1 Origin of the animals”](#) and [“5.5.1.1.2 Place where the animals are kept”](#).)
5. Click on the button: “Save and close”.

The system adds a new “card” at the end of the “09 Animal List” chapter of Form A.

**Note:** \* An animal category “card” is a record displaying all the relevant information concerning an animal category.





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**09 Animal List**

**Amphibians**

Sex: <b>MALE</b>	Requested number of animals: <b>0</b>	Previously approved: <b>0</b>	Total number of animals requested: <b>0</b>	Attachments
---------------------	--	----------------------------------	--	-------------

Genetically modified:  
**No**

Constrained Line?:  
**No**

Has this line been newly established in this facility especially for this experiment?  
**No**

Origin type	Origin ID
> Non-approved animal holding	Other

Place type	Place ID
> Non-approved animal holding	Other

**Add animal category**

Figure 64 – “Add animal category” button in Form A

**Add animal**

**Category info**

Animal category (species)

Sex

Use of genetically modified animals

☐ Yes

☐ No

Has this line been newly established in this facility especially for this experiment?

☐ Yes

☐ No

Constrained Line?

☐ Yes

☐ No

**Data sheet info and related forms**

Upload documents

No Records

Add Documents

**Number info**

Previously approved

0

Cancel **Save and close**

Figure 65 – “Add animal” pop-up window



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**09 Animal List** ⓘ 0/0

**Amphibians** ⓘ

Sex: <b>MALE</b>	Requested number of animals: <b>0</b>	Previously approved: <b>0</b>	Total number of animals requested: <b>0</b>	Attachments
---------------------	--	----------------------------------	--	-------------

---

Genetically modified:  
**No**

Constrained Line?:  
**No**

Has this line been newly established in this facility especially for this experiment?  
**No**

Origin type	Origin ID
> Non-approved animal holding	Other

Place type	Place ID
> Non-approved animal holding	Other

Figure 66 – Animal category “card”

#### 5.5.1.1.1 Origin of the animals

In order to add an origin of the animals, perform the next steps:

1. Click on the button: “Add origin”.
2. Select an origin type from the drop-down list:
  - From previous experiment
    - i. Insert the national or the cantonal number of a previous experiment.
    - ii. Click on the button: “Add and close”.

The selection appears as a row in the table: “Origin of the animals”.

- Approved animal facility (incl. own breeding)
  - From Switzerland
    - i. In the field: “National number / name of animal facility”, insert the national number or the name of an animal facility via auto-complete selection. (Insert at least two characters and the system will perform a search and display the results in a drop-down list.)  
The system searches on the master data type: “Animal facilities”.  
The address of the inserted animal facility gets pre-populated based on the master data type: “Animal facilities”.
    - ii. Click on the button: “Add and close”.  
The selection appears as a row in the table: “Origin of the animals”.
  - From abroad
    - i. In the field: “National number / name of animal facility”, insert the name or the address of an animal supplier address via auto-complete selection. (Insert at least two characters and the system will perform a search and display the results in a drop-down list.)



The system searches on the master data type: "Animal supplier addresses", the entries that have the field: "Approved" checked and that in the "Country" field have a value other than "Switzerland" selected.

Alternative: There is the option to create a new animal supplier address by clicking on the hyperlink: "Add new animal supplier address". When the hyperlink is clicked, an area is expanded, below, that contains fields from the master data type: "Animal supplier addresses". After the filling of the form, click on the button: "Save and select", in order for the field: "Name / address of animal facility" to be filled-in.

The address of the inserted animal supplier address gets pre-populated based on the master data type: "Animal supplier addresses".

- ii. Click on the button: "Add and close".

The selection appears as a row in the table: "Origin of the animals".

- Non-approved animal holding

- From Switzerland

- i. In the field: "Name / address of animal holding", insert the name or the address of an animal supplier address via auto-complete selection. (Insert at least two characters and the system will perform a search and display the results in a drop-down list.)

The system searches on the master data type: "Animal supplier addresses", the entries that have the field: "Approved" not checked and that in the "Country" field have the value: "Switzerland" selected.

Alternative: There is the option to create a new animal supplier address by clicking on the hyperlink: "Add new animal supplier address". When the hyperlink is clicked, an area is expanded, below, that contains fields from the master data type: "Animal supplier addresses". After the filling of the form, click on the button: "Save and select", in order for the field: "Name / address of animal holding" to be filled-in.

The address of the inserted animal supplier address gets pre-populated based on the master data type: "Animal supplier addresses".

- ii. Click on the button: "Add and close".

The selection appears as a row in the table: "Origin of the animals".

- From abroad

- i. In the field: "Name / address of animal holding", insert the national number or the address of an animal supplier address via auto-complete selection. (Insert at least two characters and the system will perform a search and display the results in a drop-down list.)

The system searches on the master data type: "Animal supplier addresses", the entries that have the field: "Approved" not checked and that in the "Country" field have a value other than "Switzerland" selected.



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Alternative: There is the option to create a new animal supplier address by clicking on the hyperlink: “Add new animal supplier address”. When the hyperlink is clicked, an area is expanded, below, that contains fields from the master data type: “Animal supplier addresses”. After the filling of the form, click on the button: “Save and select”, in order for the field: “Name / address of animal holding” to be filled-in.

The address of the inserted animal supplier address gets pre-populated based on the master data type: “Animal supplier addresses”.

- ii. Click on the button: “Add and close”.

The selection appears as a row in the table: “Origin of the animals”.

○ Other

- i. Fill-in the field: “Description of animal origin”.
- ii. Click on the button: “Add and close”.

The selection appears as a row in the table: “Origin of the animals”.

Notes:

- Multiple records of origin types can be added in the table: “Origin of the animals”.
- The new animal supplier addresses inserted, as described in the alternative steps above, are saved in the “Master Data Management”, linked with the associated institute.

The screenshot shows a web form titled "Origin of the animals" with a red asterisk and an information icon. Below the title is a dashed box containing the text "No origin added". Underneath is a section titled "Origin type" with an information icon and a dropdown menu. At the bottom right are "Cancel" and "Add and close" buttons. At the bottom left is an "Add origin" button.

Figure 67 – “Origin of the animals”

#### 5.5.1.1.2 Place where the animals are kept

In order to add a place where the animals are kept, perform the next steps:

1. Click on the button: “Add place”.
2. Select a place type from the drop-down list:
  - Approved animal facility (incl. own breeding)
    - i. In the field: “National number / name of animal facility”, insert the national number or the name of an animal facility via auto-complete selection. (Insert at least two characters and the system will perform a search and display the results in a drop-down list.)



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The address of the inserted animal facility gets pre-populated based on the master data type: "Animal facilities".

- ii. Check or leave unchecked the checkbox: "Permit access to Head of Animal Facility". This step can be executed only by the RM or by the CO in delegated mode.

If it is checked, then the Head of Animal Facility of this animal facility will be able to view the application for animal experiment after its approval.

- iii. In the field: "Room numbers", type a room number and click on "Enter" to insert it.

Note: It is possible to insert multiple room numbers (one by one). There is no master data connection.

- iv. Click on the button: "Add and close".

The selection appears as a row in the table: "Place where the animals are kept".

- Non-approved animal holding

- From Switzerland / abroad

- i. In the field: "Name / address of animal holding", insert the name or the address of an animal location address via auto-complete selection. (Insert at least two characters and the system will perform a search and display the results in a drop-down list.)

The address of the inserted location address gets pre-populated based on the master data type: "Animal location addresses".

- ii. Fill-in the optional field: "Description of animal holding", if it is needed.
- iii. Click on the button: "Add and close".

The selection appears as a row in the table: "Place where the animals are kept".

- Other

- i. Fill-in the field: "Description of animal holding".
- ii. Click on the button: "Add and close".

The selection appears as a row in the table: "Place where the animals are kept".

Note: Multiple records of place types can be added in the table: "Place where the animals are kept".



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Figure 68 – “Place where the animals are kept”

### 5.5.1.2 (All) Edit animal category

In order to edit an animal category, inside a Form A, execute the following steps:

1. Open an editable Form A. (See chapter: [“5.13 \(All\) Edit application”](#).)
2. Navigate to section: “Animals”, in chapter: “09 Animal List”.
3. Click on the “edit” icon:  , which exists on the top right corner of the “card”.


The system opens the pop-up window for editing.

4. Edit the desired fields. (See chapters: [“5.5.1.1.1 Origin of the animals”](#) and [“5.5.1.1.2 Place where the animals are kept”](#).)
5. Click on the button: “Save and close”.

The system updates the information of the specific animal category “card”.

### 5.5.1.3 (All) Remove animal category

In order to remove an animal category “card” from a Form A, execute the following steps:

1. Open an editable Form A. (See chapter: [“5.13 \(All\) Edit application”](#).)
2. Navigate to section: “Animals”, in chapter: “09 Animal List”.
3. Click on the “Remove” icon:  , which exists inside the “card”.

The system removes the corresponding animal category “card”.

## 5.5.2 Personnel

### 5.5.2.1 (All) Add personnel

This section describes the addition of personnel in the section: “Personnel” of Form A.

A person must, previously, exist in animex-ch and have a role in the corresponding institute in order to be selectable within a Form A.

In order to add personnel, the next steps should be followed:



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1. Open an editable Form A. (See chapter: [“5.13 \(All\) Edit application”](#).)
2. Navigate to section: “Personnel”, in chapter: “11 Personnel Details” of Form A.
3. Click on the button: “Add person”.
4. The system opens a pop-up window, containing a form.
5. Fill-in at least all the mandatory fields.
6. Click on the button: “Save and close”.

The system adds a new record at the end of the table in “11 Personnel Details”.

#### Notes:

- The RM is automatically inserted in the first table row, based on the selection on the wizard page.
- For the role of RM, no traffic light is displayed.
- The principal SDI is automatically inserted in the second table row, based on the selection on the wizard page.
- For the fields: “Resource Manager”, “Study Director”, and “Role”, a non-blocking warning is displayed when the selected system role does not have a corresponding approved role in any canton. This warning is displayed within the personnel table. This warning does not block the submission process and persists until the application reaches a decision (application status: “Approved”, “Approved on hold”, or “Disapproved”).
- For the fields: “Resource Manager”, “Study Director”, and “Role”, a warning should be displayed when the user has the corresponding approved role, but the approval has expired. This warning does not block the submission process and persists until the application reaches a decision (application status: “Approved”, “Approved on hold”, or “Disapproved”).
- The same person cannot be a principal SDI and a deputy SDI (case possible only when the same person is principal SDI and IPI - as deputy SDI).

Name	Role	Status	DSDI	Responsibility	Action
First name Last name	Resource Manager (RM)			Resource manager	
First name Last name	Study Director of Institute (SDI) <small>The system role does not have a corresponding approved role</small>			Principal study director	
AWOI_firstname AWOI_lastname	Study Director of Institute (SDI)			Deputy Study Director of Institute	

**Add person**

Figure 69 – “Add person” button in Form A



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
Figure 70 – “Add personnel” pop-up window

### 5.5.2.2 (All) Edit personnel

In order to edit the personnel, inside a Form A, execute the following steps:

1. Open an editable Form A. (See chapter: “[5.13 \(All\) Edit application](#)”.)
2. Navigate to section: “Personnel”, in chapter: “11 Personnel Details” of Form A.



3. Click on the “edit” icon: , which exists under the “Action” column of each table row.

The system opens the pop-up window for editing.

4. Edit the desired fields.
5. Click on the button: “Save and close”.


The system updates the information of the specific personnel record.

**Note:** The records of “Resource Manager” and “Study Director of Institute” cannot be edited in chapter: “11 Personnel Details” of Form A. They can be edited only in section: “01 Address of the applicant” and in statuses: “Draft” or “Returned for rewrite”.

### 5.5.2.3 (All) Remove personnel

In order to remove personnel from a Form A, execute the following steps:

1. Open an editable Form A. (See chapter: “[5.13 \(All\) Edit application](#)”.)
2. Navigate to section: “Personnel”, in chapter: “11 Personnel Details” of Form A.

3. Click on the “delete” icon: , which exists under the “Action” column of each table row.

The system removes the corresponding personnel record.

**Note:** The records of “Resource Manager” and “Study Director of Institute” cannot be removed from chapter: “11 Personnel Details” of Form A. They can be removed only from section: “01 Address of the applicant” in statuses: “Draft” and “Returned for rewrite”.





## 5.6 (All) Create [SC] Supplementary application

A supplementary application can be created by following the steps below:

1. Navigate to main navigation menu: "Animal Experiments".
2. Select "Applications for animal experiments".  
The system displays the search page of applications for animal experiments.
3. Search for an application of any type that is in status: "Approved" or "Approved on hold".
4. Select an application of any type that is in status: "Approved" or "Approved on hold".  
The system redirects to the page of Form A.
5. Click on the button: "Create", which exists in the sticky row. (See chapter: ["5.3.3 \(All\) Sticky row"](#).)
6. Select the option: "[SC] Supplementary application".  
The system asks for confirmation of request.
7. In order to confirm, click on "Yes".  
The system displays the Form A fields pre-filled with default values.
8. Edit the desirable field(s).
9. Click on the button: "Save".

Alternative: Click on the button: "Validate" in order to validate the form. When the validation is performed via the "Validate" button, the system automatically scrolls to the field identified with a validation error.

The system validates the form and if the validation is successful, a message of successful validation is displayed. In addition, the system redirects to the edit page of Form A.

### Notes:

- A [SC] takes over all Form A fields, as well as the documents, comments and questions / answers of these fields. All of these fields, apart from the field: "2 Address of the cantonal authority" and the field: "Animal category" of all inherited animal category "cards" (section: "09 Animal List"), can be updated when editing the application.
- A [SC] can be created for any application type ([N], [R], [SC], [SV], [SP], and [SR]).
- A [SC] inherits the national number from their "parent" application ([N] or [R]).
- A [SC] can be created, only when the "parent" application is in status: "Approved" or "Approved on hold".
- Parallel applications are not allowed. In order to create a supplementary application, the "parent" must not have another [R], [SC], [SV], [SP], or [SR] in the following status groups: "Draft" and "Pending", with exception to statuses: "Decide deadline", "Appealed", and "Unlocked after appeal". (For the description of the status groups, see chapter: ["5.3.1 \(All\) Search application"](#).)
- From 0 - 15 [SC] can be created in a "Family".
- In case the "parent" application reaches the "Expired" status before the approval of the "child" [SC], the "child" [SC] will be automatically dismissed.
- In the "09 Animal List" section, the field: "Previously approved" has the value of the authorization field: "Total number of animals approved" from the "parent" application.
- The inherited animal category "cards" cannot be removed from a [SC].
- Additionally, for inherited animal category "cards", the "Animal category (species)" field is



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not editable, but the rest of the animal category “card” information is editable.

- Rich-text fields:
  - When creating a [SC], as a “child” of a [N], the system automatically concatenates a separator / header text, above the previous [N] rich-text fields. The system allows to add the new [SC] text in a separate editable rich-text field (empty by default), below each concatenated non-editable field.
  - When creating a [SC], as a “child” of a [SC], the system automatically concatenates (merges) the previous [SC] rich-text fields and their “parent” fields, with a separator / header text in between. These fields will be non-editable. The system allows to add the new [SC] application text in a separate editable rich-text field (empty by default), below each concatenated non-editable field.
  - When creating a [SC], as a “child” of a [R], [SP], [SV], or [SR], the system automatically inherits previous rich-text fields from the “parent” application. These fields will be non-editable. The system allows to add the new [SC] text in a separate editable rich-text field (empty by default), below each concatenated non-editable field.
  - According to the previous rules, a [SC] has two rich-text fields per section (one editable and one non-editable).

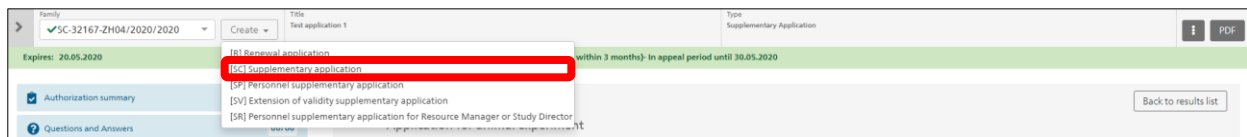


Figure 71 – Create [SC] Supplementary application

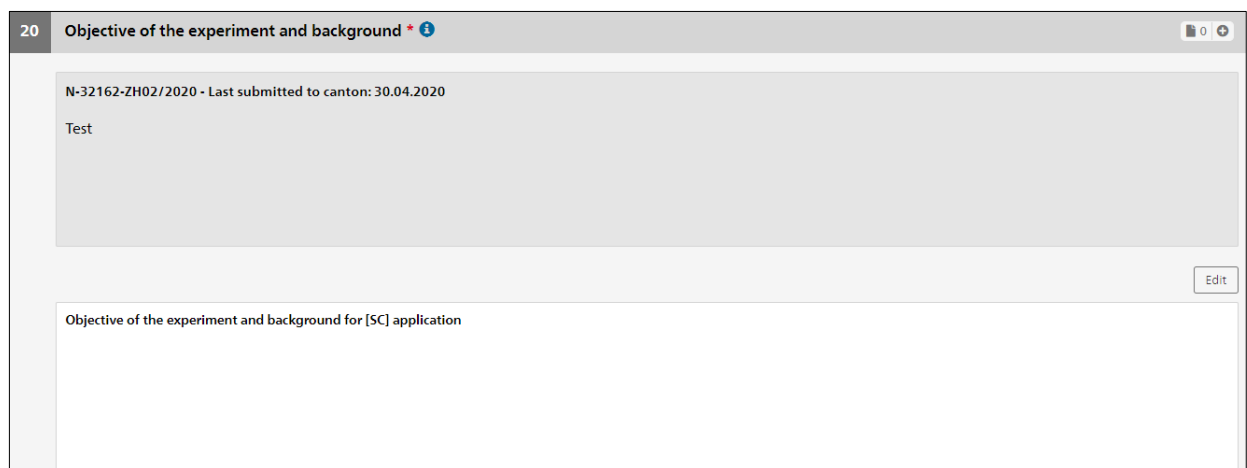


Figure 72 – [SC] “child” of “parent” [N] - Concatenation of rich-text fields

## 5.7 (All) Create [SP] Personnel supplementary application

A personnel supplementary application can be created by following the same steps as in chapter: “[5.6 \(All\) Create \[SC\] Supplementary application](#)”. The difference is in step 6, where the option: “[SP] Personnel supplementary application” must be selected.

### Notes:

- A [SP] will take over all Form A fields, as well as the documents, comments and questions / answers of these fields. Only the information of Study Directors (except from the



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- principal) and Involved Persons in chapter: “11 Personnel Details” of Form A is editable.
- Rich-text fields:
  - When creating a [SP], as a “child” of a [N], the system automatically concatenates a separator / header text, above the previous [N] rich-text fields. These fields are non-editable. The system does not display any additional rich-text field.
  - When creating a [SP], as a “child” of a [R], [SP], [SV], [SR], the system automatically inherits previous rich-text fields from the “parent” application. These fields are non-editable. The system does not display any additional rich-text field.
  - When creating a [SP], as a “child” of a [SC], the system automatically concatenates (merges) the previous [SC] rich-text fields and their “parent” fields, with a separator / header text in-between. These fields are non-editable. The system does not display any additional rich-text field.
  - According to the previous rules, a [SP] has one rich-text field per section (non-editable).
- The other notes are similar to the respective in chapter: “[5.6 \(All\) Create \[SC\] Supplementary application](#)”.



Figure 73 – Create [SP] Personnel supplementary application

## 5.8 (All) Create [SR] Personnel supplementary application for Resource Manager or Principal Study Director

A personnel supplementary application for Resource Manager or Principal Study Director can be created by following the same steps as in chapter: “[5.6 \(All\) Create \[SC\] Supplementary application](#)”. The difference is in step 6, where the option: “[SR] Personnel supplementary application for Resource Manager or Principal Study Director” must be selected.

### Notes:

- As RM, you cannot change the RM in section: “01 Address of the applicant”. When as RM, you change the “Resource Manager” field of section: “01 Address of the applicant”, then the system displays a warning message that you cannot perform this action and reverts the selected value to the original (the one before the change).
- As SDI, you cannot change the SDI in section: “01 Address of the applicant”. When as SDI, you change the “Study Director of Institute” field of section: “01 Address of the applicant”, then the system displays a warning message that you cannot perform this action and reverts the selected value to the original (the one before the change).
- When changing the principal SDI, in field: “Study Director of Institute” of section: “01 Address of the applicant”, and entering a person that is already declared as deputy SDI (IPI) or SDI in the “11 Personnel Details”, then the system displays a warning message that there is already a person with the same role and reverts the selected value to the original (the one before the change).
- A [SR] will take over all Form A fields, as well as the documents, comments, and questions / answers of these fields. Only the information of Resource Manager or principal Study Director in chapter: “01 Address of the applicant” of Form A is editable.



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- The other notes are similar to the respective in chapter: "[5.6 \(All\) Create \[SC\] Supplementary application](#)".

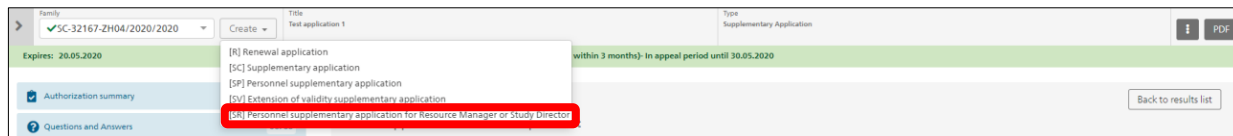


Figure 74 – Create [SR] Personnel supplementary application for Resource Manager or Study Director

## 5.9 (All) Create [SV] Extension of validity supplementary application

An extension of validity supplementary application can be created by following the same steps as in chapter: "[5.6 \(All\) Create \[SC\] Supplementary application](#)". The difference is in step 6, where the option: "[SV] Extension of validity supplementary application" must be selected.

### Notes:

- The maximum prolongation of an application for animal experiment is 3 years and 3 months.
- A [SV] will take over all Form A fields, as well as the documents, comments, and questions / answers of these fields. Only the chapter: "8 Duration of project and date of start" of Form A is editable.
- An extension of validity supplementary application can be created starting 3 months before the expiration of the "parent" license. (See field: "Situation" in chapter: "[5.3.3 \(All\) Sticky row](#)".)
- The other notes are similar to the respective in chapter: "[5.6 \(All\) Create \[SC\] Supplementary application](#)".



Figure 75 – Create [SV] Extension of validity supplementary application

## 5.10 (All) Intercantonal applications

The primary canton is the one where most of the experiments take place, geographically. If it is not clear where this is, the cantons involved must decide who shall take overall responsibility. (See Art. 139 §2 of the Animal Protection Ordinance, SR 4.55.1.)

An intercantal application is always sent via the system, first, to the primary canton. The primary canton triggers the process of consultation and / or submission of the application to the secondary cantons.

The decision of each secondary canton with the decision date are visible on the Form AB.

An intercantal application can be created inside a Form A:

- In section: "3 Intercantal experiment?", select "Yes".



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2. In the field: “Secondary cantons”, select the desired secondary cantons.

**03 Intercantonal experiment**

Is the experiment performed in more than one canton? \*

☒ Yes

Secondary cantons \*

AG

☐ No

Figure 76 – Intercantonal experiment



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## 5.10.1 Process diagram

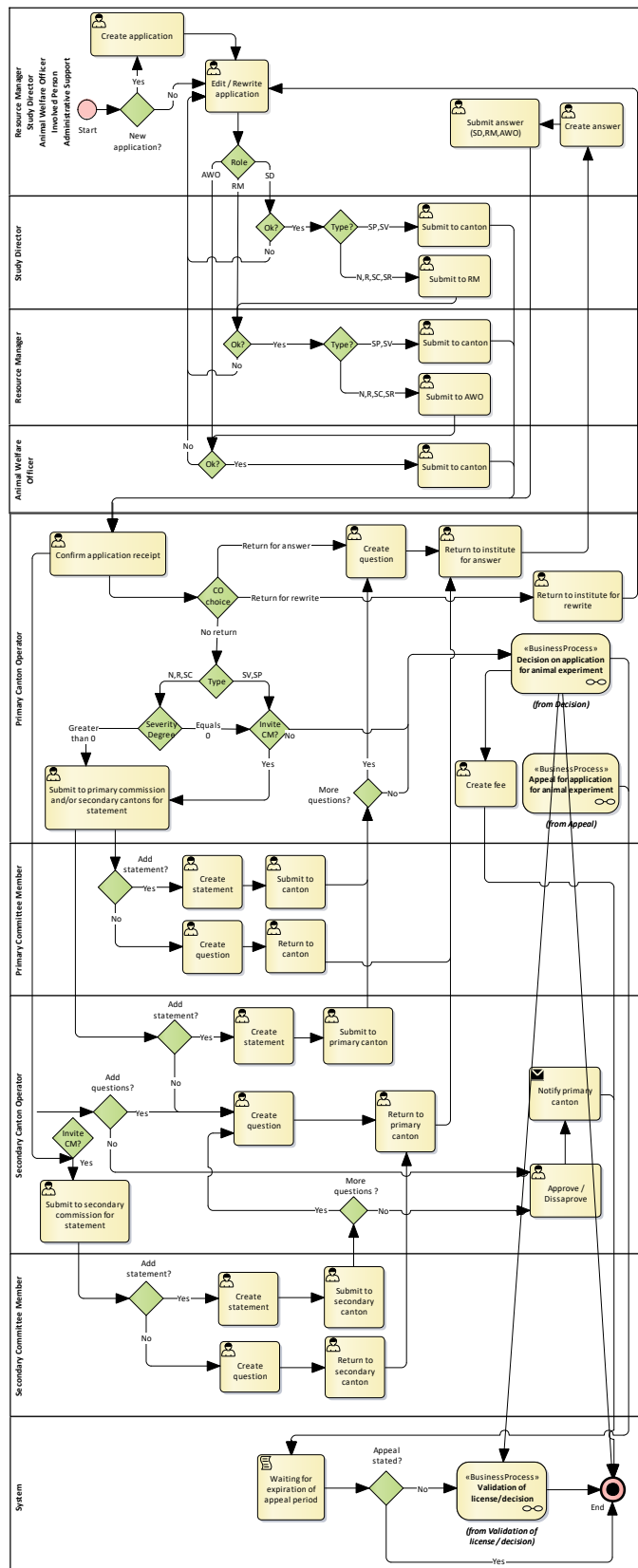


Figure 77 – Process diagram: Application for animal experiment



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## 5.11 (All) Compare applications from a “Family”

The comparison of application types is implemented inside a Form A:

1. Navigate to the sticky row of a Form A. See chapter: [“5.3.3 \(All\) Sticky row”](#).
2. Click on the icon: .
3. Click on the option: “Compare”.

The system presents, in a pop-up menu, all the applications of the “Family”, excluding the current one.

4. Select the application with which the current application should be compared to

After performing the comparison, the system marks the changed numbered section(s) on the left navigation menu and also in the content area of the current application.

Alternative: Select the option: “Close”. Then the system closes the comparison functionality and returns to the current Form A.

### Notes:

- A numbered section may contain several sub-sections. However, only the “parent” numbered section is highlighted. For example, the sections: “Basics”, “Animals”, “Personnel”, “Purpose of the experiment”, etc. are considered “parent” sections and are highlighted.
- Changed sections remain highlighted, until either the page is refreshed, or the button: “Clear comparison” is clicked.
- If a “Draft” application is edited, then in order for the comparison to be enabled and take into consideration the updated fields, the following steps should be performed:
  1. Click on the button: “Save”.
  2. Click on the button: “Compare”.
  3. Select the option: “Clear comparison”.
  4. Update field(s).
  5. Click on the option: “Compare”, in order for the comparison functionality to be enabled, again, and to take into consideration the updated fields.
- The field: “Timestamp of the submission to the canton”, which is part of section “14 Animal Welfare Officer of Institute”, is not used for comparison.



Figure 78 – “Compare” Form A application types button



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Figure 79 – Compare Form A application types ([N] with [SC])

## 5.12 (All) Export Form A to PDF format

The export of a Form A to PDF format is executed inside a Form A:

Click on the button: “PDF”, which exists in the sticky row. (See chapter: “[5.3.3 \(All\) Sticky row](#)”.)

By clicking on this button, the PDF document of the, currently, visible Form A is generated and downloaded.

### Notes:

- The exported PDF contains:
  - All Form A fields and their corresponding values.
  - All Form A answered questions.
  - All Form A “Documents” list.
  - All Form A “AWOI statements”.
  - All Form A “Comments”.
- The language of the exported Form A depends on the pre-selected language in animex-ch.
- The sections highlighted in compare mode are not marked in pdf export.





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Figure 80 – Form A “PDF” export button

## 5.13 (All) Edit application

An application for animal experiment can be edited by all institute users in the following statuses: “Draft”, “Draft pending RM”, “Draft pending AWOI”, “Returned for rewrite”, “Returned for rewrite pending RM”, and “Returned for rewrite pending AWOI”.

When an application is editable, editing of the fields can be performed. After performing any update, the button: “Save” must be clicked, in order for the system to update the Form A. The successful saving of the update(s) is indicated with an informative (green) message.

If the status of the application in conjunction with the user's system role, do not permit the edit of the application, the system displays the view page of the application.

Note: The checkbox: “AWOI lock” is editable only by the AWOI. When it is checked, the Form A is editable only by the AWOI. (See chapter: [“5.3.3 \(All\) Sticky row”](#).)

## 5.14 (All) Delete application

The deletion of an application can be performed by all institute users in one of the statuses: “Draft”, “Draft pending RM”, and “Draft pending AWOI”, by clicking on the button: “Delete”. This button exists in the sticky row. (See chapter: [“5.3.3 \(All\) Sticky row”](#).)

After clicking on it, the system asks for confirmation of request. In order to confirm the deletion of the application, click on “Yes”. Then, the system deletes all stored data connected with the form (i.e., fields, tables, comments, documents, AWOI statements, etc.), and displays the “Start page”. A notification is sent to the RM, the principal SDI, and the institute's AWOIs that had an “Open” task for the application.

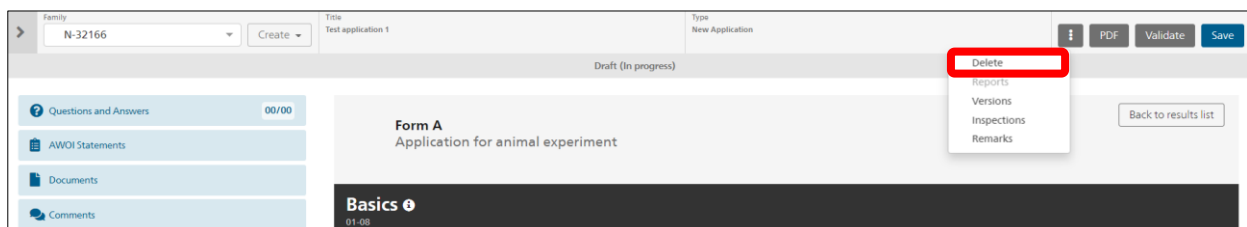


Figure 81 – “Delete” Form A button



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## 5.15 AWOI statement

Several statements can be requested for one application but the process is always the following:

The RM or the SDI requests an AWOI statement > The AWOI creates an AWOI statement.

### 5.15.1 (All) View “AWOI statements” list

In order to view the “AWOI statements” list, navigate to chapter: “AWOI statements”, which exists on the left navigation menu of a Form A.

The system opens a pop-up window and presents (if any) the “AWOI statements”.



Figure 82 – “AWOI statements” list

### 5.15.2 (RM, SDI) Request AWOI statement

1. Navigate to chapter: “AWOI statements”, which exists on the left navigation menu of a Form A.

The system opens a pop-up window and presents (if any) the “AWOI statements” list.

2. Click on the button: “Request AWOI statement”.

#### Notes:

- The action of requesting an AWOI statement creates a task to all AWOIs that are associated to the institute of the application.
- The “Open” AWOI statements are automatically closed after the submission of an application to canton.
- An AWOI statement can be requested in the following application statuses: “Draft”, “Draft pending RM”, “Draft pending AWOI”, “Returned for rewrite”, “Returned for rewrite pending RM”, and “Returned for rewrite pending AWOI”.
- No request for AWOI statement can be made, as long as there is already an “Open” request for AWOI statement.
- If a second AWOI statement is needed, then a second AWOI request should be made.
- An AWOI statement is not mandatory, in order to submit an application for animal experiment.



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Figure 83 – “AWOI Statements” chapter

Figure 84 – “Request AWOI statement” button

### 5.15.3 (AWOI) Create AWOI statement

1. Navigate to chapter: “AWOI Statements” chapter, which exists on the left navigation menu of a Form A.

The system opens a pop-up window and presents (if any) the “AWOI statements” list.

2. Fill-in the statement text field.
3. Click on the button: “Add statement”, in order to add the statement.

The system adds and, immediately, displays the statement in the “AWOI statements” list.

Alternative: Click on the button: “Clear”, in order to clear the text field of the statement.

#### Notes:

- After the creation of the AWOI statement, the RM or the SDI, who requested the statement, receives a notification.



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- An AWOI statement can be created when there is an “Open” request for AWOI statement and in the following application statuses: “Draft”, “Draft pending RM”, “Draft pending AWOI”, “Returned for rewrite”, “Returned for rewrite pending RM”, and “Returned for rewrite pending AWOI”.
- An AWOI statement cannot be created in delegated mode.
- Only one AWOI statement can be created by an AWOI during the same process cycle.

Figure 85 – Create AWOI statement

## 5.16 (SDI, AWOI) Send application to RM

When the SDI or the AWOI has completed the editing of Form A and wants to send the application to the RM, they should click on the button: “Send to RM”, which exists in the sticky row. (See chapter: “[5.3.3 \(All\) Sticky row](#)”.) This button is enabled, when the validation of the application is successful (no blocking validation errors exist anymore).

### Notes:

- The application types that can be sent using the button: “Send to RM” are the following: [N], [R], [SC], [SP], [SR], and [SV].
- The application received by the RM is editable by all institute roles declared in the application.
- The button: “Send to RM” appears in the application statuses: “Draft”, “Draft pending SDI”, “Draft pending AWOI”, “Returned for rewrite pending SDI”, and “Returned for rewrite pending AWOI”.
- After the successful execution of the action: “Send to RM”, the RM receives a task.

Figure 86 – “Send to RM” button (SDI logged-in role)



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## 5.17 (SDI, AWOI) Send application to SDI

When the RM or the AWOI has completed the editing of Form A and wants to send the application to the SDI, they should click on the button: “Send to SDI”, which exists in the sticky row. (See chapter: “[5.3.3 \(All\) Sticky row](#)”.) This button is enabled, when the validation of the application is successful (no blocking validation errors exist anymore).

### Notes:

- The application types that can be sent using the button: “Send to SDI” are the following: [N], [R], [SC], [SP], [SR], and [SV].
- The application received by the SDI is editable by all institute roles declared in the application.
- The button: “Send to SDI” appears in the application statuses: “Draft”, “Draft pending RM”, “Draft pending AWOI”, “Returned for rewrite pending RM”, and “Returned for rewrite pending AWOI”.
- After the successful execution of the action: “Send to SDI”, the SDI receives a task.

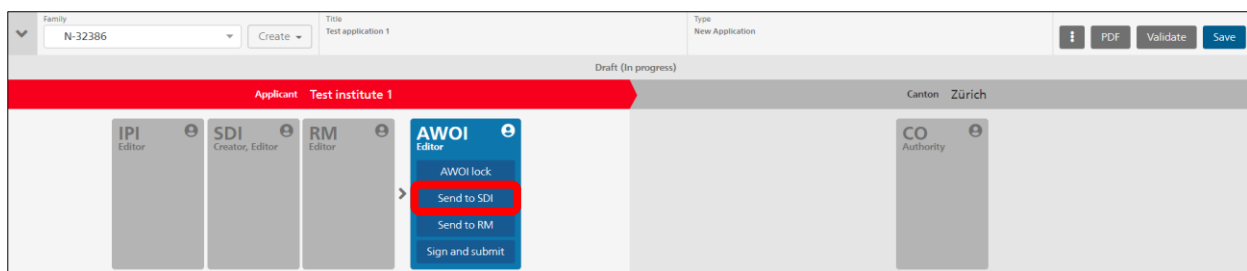


Figure 87 – “Send to SDI” button (AWOI logged-in role)

## 5.18 (RM, SDI) Send application to AWOI

When the RM or the SDI has completed the editing of Form A and wants to send the application to the AWOI, they should click on the button: “Send to AWOI”, which exists in the sticky row. This button is enabled, when the validation of the application is successful (no blocking validation errors exist anymore).

### Notes:

- The application types that can be sent using the button: “Send to AWOI” are the following: [N], [R], [SC], [SP], [SR], and [SV].
- The application received by the RM is editable by all institute roles declared in the application.
- The button: “Send to AWOI” appears in the application statuses: “Draft”, “Draft pending RM”, “Draft pending SDI”, “Returned for rewrite”, “Returned for rewrite pending RM”, and “Returned for rewrite pending SDI”.
- After the successful execution of the action: “Send to AWOI”, the institute’s AWOIs receive a task.



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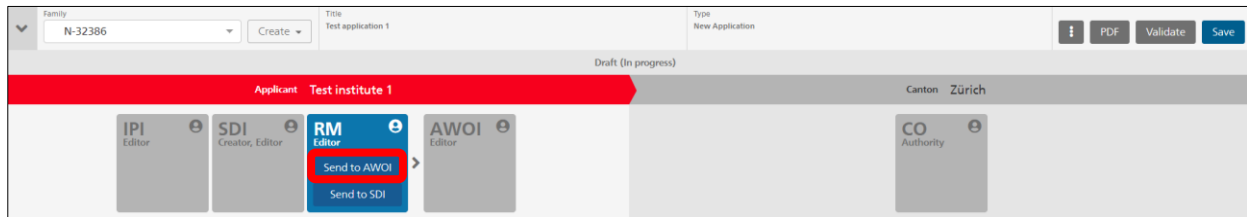


Figure 88 – “Send to AWOI” button (RM logged-in role)

## 5.19 (RM, SDI, AWOI) Submit application to (primary) canton

After the completion of the application, it can be submitted to the primary canton declared in the field: “02 Address of the cantonal authority”. For this, follow the next steps:

1. Click on the button: “Sign and submit to canton”.

The system opens a pop-up window with a mandatory comment field.

2. Insert a comment.

3. Click on the button: “Sign and submit to canton”.

The system displays a confirmation message.

The pop-up window closes and the comment is added in the “Comments” list.

The system remains on the non-editable Form A page.

### Notes:

- **For the RM and the SDI:** The button: “Sign and submit” is visible only for the application types: “[SP] Personnel supplementary application” and “[SV] Extension of validity supplementary application”.
- **For the AWOI:** The button: “Sign and submit” is visible for all application types.
- After the successful submission to canton, the COs of the primary canton receive a task, whereas the RM, the principal SDI, and the Primary CO receive a notification.

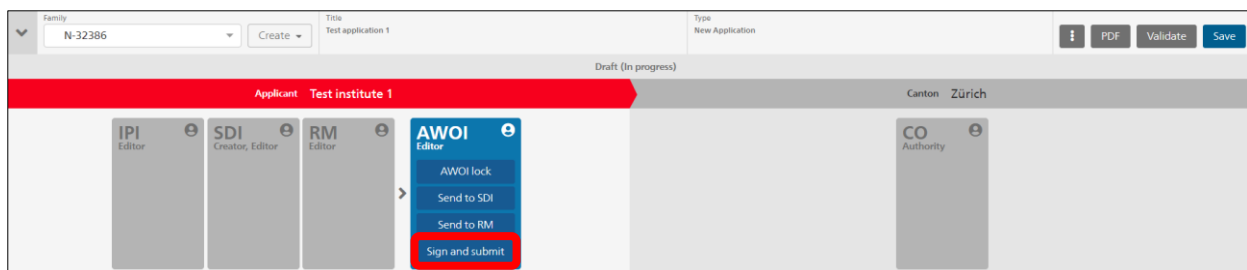


Figure 89 – “Sign and submit” Form A button

## 5.20 (RM, SDI, AWOI) Withdraw application

In order to withdraw an application for animal experiment, perform the next steps:

1. Navigate to a Form A that is in status: “Returned for answer” or “Returned for rewrite”.



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2. Click on the button: “Withdraw”, which exists in the sticky row. (See chapter: [“5.3.3 \(All\) Sticky row”](#).)

The system opens a pop-up window with a mandatory comment field.

3. Click on the button: “Withdraw application”.

The system asks for confirmation of request.

4. In order to confirm, click on “Yes”.

The system closes the pop-up window and withdraws the application.

The system displays a confirmation message.

The comment is added in the “Comments” list.

#### Notes:

- The primary CO, the RM, the principal SDI, and the institute’s AWOIs receive a notification, after the withdrawal of an application.
- After a license is withdrawn, the Form A and its associated objects (documents, comments, AWOI statements, etc.) are accessible only as non-editable.
- If the application is withdrawn, while it has been returned for answers, then all unanswered questions and “Draft” (not submitted) answers will be deleted.



Figure 90 – “Withdraw” Form A button

## 5.21 Application dismissal

In case the institute is not responding to answering or resubmitting the application, the CO has the option to dismiss the application. Additionally, the system automatically dismisses an application, when the “parent” application status is “Appealed” and the “child” application status group is “Draft” or “Pending”. (For the description of the status groups, see chapter: [“5.3.1 \(All\) Search application”](#).)

#### Notes:

- The primary CO, the RM, the principal SDI, and the AWOI receive a notification after the dismissal of an application for animal experiment.
- After an application is dismissed, the Form A and its associated objects (documents, comments, AWOI statements, etc.) are accessible only as non-editable.
- If the application is dismissed, while it has been returned for answers, then all unanswered questions and “Draft” (not submitted) answers will be deleted.



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## 5.22 (All) View “Versions” list

The user can view the list of all status changes of an application (including the ones with a full version) by following the steps below:

1. Navigate to the sticky row of a Form A. See chapter: [“5.3.3 \(All\) Sticky row”](#).
2. Click on the icon: .
3. Click on the option: “Versions”.

The system displays the “Versions” list with the date and time of status change, as well as, the name and surname of person who was responsible for the status change (or “System” in case of a system triggered status change).

4. Click on the hyperlink, under the column: “Status”, which opens the corresponding application version in a new browser tab. This hyperlink is displayed only for the application statuses: “Submitted”, “Returned for rewrite”, and “Resubmitted with rewrite”, “Approved” and “Disapproved”. In these statuses a full application version is stored.

### Notes:

- An application version stores:
  - The timestamp of status change.
  - The status of the application after the status change occurs.
  - The person (first name and last name) responsible for the status change. In case a status change is triggered by the system, the “System” will be stored as responsible for the status change.
- A full application version stores:
  - All Form A fields and their corresponding documents at the time of status change.
  - All Form A comments and their corresponding documents at the time of status change.
  - All Form A questions / answers and their corresponding documents at the time of status change.
  - All Form A AWOI statements at the time of status change.
  - Version of the PDF license / decision and secondary canton decisions PDF (in case of intercantonal application) (only for the statuses: “Approved” and “Disapproved”)

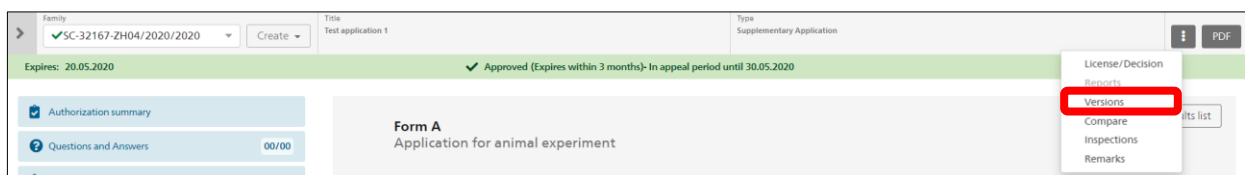


Figure 91 – Form A “Versions” option





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Application versions			X
STATUS	DATE	PERSON	
Approved	13.03.2020 21:59:18	First name Last name	
Received	13.03.2020 21:58:29	First name Last name	
Submitted	13.03.2020 21:58:10	First name Last name	
Draft	13.03.2020 21:57:26	First name Last name	
			Close



Figure 92 – “Application versions” list

## 5.23 Questions & answers

All institute roles are able to answer a question received by the canton but only the RM, the SDI, and the AWOI are able to submit this answer to canton.

### 5.23.1 (All) View “Questions and Answers” chapter

In order to view the “Questions and Answers” chapter, execute one of the following actions:

Navigate to Form A and click on the chapter: “Questions and Answers” or click on the question indicator, which exists on a field:  1/1 .

The system opens the “Questions and Answers” pop-up window with all the questions and answers in chronological descending order per application form field. All questions and answers are marked with the system role that created them and the timestamp of the latest action.

Note: If a [R] application is submitted, the questions and answers from previous application types will no longer be available. For all other supplementary application types, all the questions and answers will be inherited.



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Figure 93 – “Questions and Answers” chapter and “Questions and Answers” field indicator

## 5.23.2 (All) Create answer

### 5.23.2.1 Create answer from “Questions and Answers” chapter

In order to create an answer from the “Questions and Answers” chapter, perform the following steps:

1. Navigate to a Form A and click on chapter: “Questions and Answers”.

The system opens the “Questions and Answers” pop-up window.

2. Select a question by clicking on the “plus” icon: .

The system opens the “Add answer” pop-up window.

3. Insert the answer in the “Answer” field.
4. Add, optionally, document(s), by clicking on the button: “Add Documents”.
5. Click on the button: “Save”.

The answer is added to that question together with the information of the your system role and the timestamp of creation.

#### Notes:

- The creation of answer(s) is possible in application status: “Returned for answer”.
- An answer cannot be given without a question.
- A question can have only one answer.
- Only the questions that were defined in the current “Questions and Answers” process cycle can be answered.
- All questions have to be answered, for the application to be submitted to the canton.



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Figure 94 – “Questions and Answers” pop-up window

Figure 95 – “Add answer” pop-up window

### 5.23.2.2 Create answer from a “Questions and Answers” field in Form A

In order to create an answer from the “Questions and Answers” field, perform the following steps:

1. Navigate to a Form A and click on the icon with the question indicator, which exists on a field:

The system displays the “Questions and Answers” pop-up window with the question that needs answering concerning this field.

2. Click on the “plus” icon:



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The system opens the “Add answer” pop-up window.

3. Select a field in the “Field”.
4. Enter a question in the “Question” field.
5. Click on the button: “Save”.

The pop-up window closes and the new question is added in the “Questions and Answers” list, together with the information of your system role and the timestamp of creation.

#### Notes:

- The creation of answer(s) is possible in application status: “Returned for answer”.
- An answer cannot be given without a question.
- A question can have only one answer.
- Only the questions that were defined in the current “Questions and Answers” process cycle can be answered.
- All questions have to be answered, for the application to be submitted to the canton.

Figure 96 – Create answer from a “Questions and Answers” field in Form A

### 5.23.3 (All) Edit answer

The answer to a question can be edited **before** the application is returned to canton / Commission with answers.

1. Navigate to a Form A and click on chapter: “Questions and Answers”.

The system opens the “Questions and Answers” pop-up window.

Alternative: Navigate to a Form A and click on the icon with the question indicator, which exists on a field:

The system displays the “Questions and Answers” pop-up window with the question that needs answering concerning this field.




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- Click on the “edit” icon: , which is placed next to each answer.

The system opens the pop-up window: “Edit answer”.

- Edit the answer field.
- Click on the button: “Save”.

The system updates the answer and its timestamp.

#### Notes:

- The editing of answer(s) is possible in application status: “Returned for answer”.
- You can modify, only those answers, which were created in the current questions and answers process cycle and have not, yet, been submitted to canton (answer status: “Draft”).

### 5.23.4 (RM, SDI, AWOI) Submit answer

All the answers can be sent to the canton or to the Commission by clicking on the “Submit answers” button, which exists in the sticky row. (See chapter: [“5.3.3 \(All\) Sticky row”](#).)

All the questions must be answered, in order to be able to submit the application back to the canton.

#### Notes:

- The submission of answer(s) signifies the ending of a questions & answers cycle for an application for animal experiment, between the institute and the canton and / or the Commission.
- The submission of answer(s) is possible, when the institute user answers question(s), which have been submitted to the institute by the canton or by the Commission. The application status when there is a pending answer at institute level is “Returned for answer”. Also, the submission of answer(s) is possible, while the “parent” application is not in status: “Appealed”.

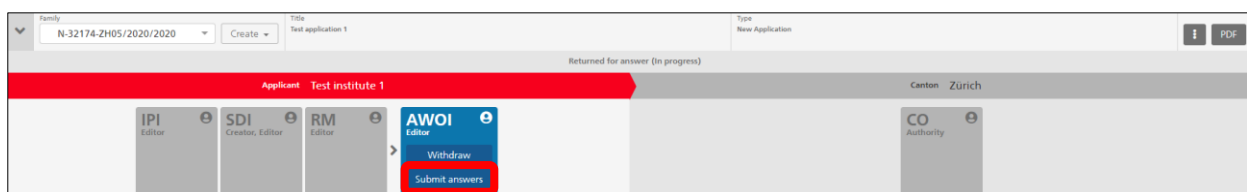


Figure 97 – “Submit answers” button

#### 5.23.4.1 Submit answer to (primary) canton

After the submission of the answer to the (primary) canton, the system automatically sends a notification to the RM, the principal SDI, and the institute’s AWOIs that the application was re-submitted to canton with answers. Also, the system assigns a task to the primary CO.



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#### 5.23.4.2 Submit answer to (primary) Commission

If the Commission deadline has expired or has less than 6 days remaining, then the system suspends the Commission loop flow and assigns a task to the (primary) CO, in order to decide about the deadline. In addition, the application status changes to “Decide deadline”. This status indicates that the (primary) CO has two options, either to continue with the current deadline or to change the deadline.

After the submission of the answer(s) to the (primary) Commission, the system automatically sends a notification to the (primary) Commission, the institute’s AWOIs, the RM, and to the principal SDI that the application was resubmitted to Commission with answers.

## 5.24 Cantonal decision

### 5.24.1 (All) Download license to PDF document

1. Navigate to the “Family” section of a Form A.
2. Click on the icon: .
3. Select the option: “License / Decision”.

The system downloads the PDF of the license / decision, which was generated, when the application was, initially, approved or disapproved, respectively.

In case the application is intercantonal, a second document containing the secondary canton decisions is also downloaded, after clicking on the option: “License / Decision”. This is the current state of decisions.



Figure 98 – Download “License/Decision” button

### 5.24.2 View “Authorization summary”

The “Authorization” summary chapter contains fields from the canton’s authorization displayed as non-editable. In order to open an “Authorization summary”, proceed with the following steps:

1. Navigate to a Form A, which is in status: “Approved”, “Approved on hold”, or “Disapproved”.
2. Navigate to chapter: “Authorization summary”.

The system opens the “Authorization summary” pop-up window.



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The screenshot shows the 'animex-ch' web application interface. At the top, there's a header with the Swiss flag and the text 'animex-ch'. Below the header, there's a navigation bar with tabs: 'Start page', 'Tasks, notifications and open forms', 'Animal Experiments', 'Person', and 'Courses'. The 'Animal Experiments' tab is active. Below the navigation bar, there's a form titled 'Form A Application for animal experiment'. The form has a sidebar on the left with a list of sections: 'Authorization summary' (highlighted with a red box), 'Questions and Answers', 'AWOI Statements', 'Documents', 'Comments', and 'Basics'. The 'Authorization summary' section is expanded, showing a list of sub-sections: '01 Address of the applicant', '02 Address of the cantonal authority', '03 Intercantonal experiment', and '04 Title of application'. The main content area shows the 'Basics' section with a sub-section '01 Address of the applicant'. The form is in a 'New Application' state and is 'Approved (Expires within 3 months) - In appeal period until 19.08.2020'. The form has a 'Back to results list' button and a 'PDF' button.

Figure 99 – Form A “Authorization summary” chapter

The screenshot shows a 'pop-up window' titled 'Authorization summary'. The window has a sidebar on the left with a list of chapters: '1 Summary', '2 Validation', '3 Requirements and conditions', '4 Special provisions', '5 General restrictions', '6 Commission details', '7 Documents', and '8 Purpose'. The '1 Summary' chapter is selected. The main content area shows the 'Summary' section with a list of fields: 'Application type' (with a dropdown menu showing '[N] New Application'), 'Resource manager' (with a dropdown menu), 'Name' (with a text input field), 'E-mail' (with a text input field), 'Tel. No.' (with a text input field), 'Institute' (with a dropdown menu), 'Street' (with a text input field), 'Postal Code' (with a text input field), and 'Town' (with a text input field). The window has a 'Close' button in the bottom right corner.

Figure 100 – “Authorization summary” pop-up window

## 5.25 (RM) Terminate valid license

By terminating a valid license, it means that no more experiments will be performed in the future with that license. Therefore, once the license has been terminated, it won't be possible to generate a renewal or supplementary application of any type for this license.

The RM and the primary CO have the rights for terminating a license.

The detailed steps are given below:

1. Navigate to a valid Form A (in status: “Approved” or “Approved on hold”).
2. Click on the button: “Terminate”, which exists in the sticky row. (See chapter: [“5.3.3 \(All\) Sticky row”](#).)



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The system identifies that the application does not have any “child” application (renewal or supplementary of any type) in the following status groups: “Draft” or “Pending”. (For the description of the status groups, see chapter: [“5.3.1 \(All\) Search application”](#).)

The system opens a pop-up window for optional comment.

Alternative: The system identifies that the application has a “child” application (renewal or supplementary of any type) in the following statuses: “Draft” or “Pending”. (For the description of the status groups, see chapter: [“5.3.1 \(All\) Search application”](#).)

The system displays a warning message that the termination of the specific license is impossible and that in order to proceed, the “child” application should either be dismissed (by the CO) or withdrawn (by the RM, the SDI, or the AWOI).

3. Insert a comment (optional).
4. Click on the button: “Terminate”.

The system asks for confirmation of request.

5. In order to confirm, click on “Yes”.

The license is terminated and a confirmation message is displayed.

The system remains on the non-editable Form A page.

#### Notes:

- After a license is terminated, the system generates a notification for the primary CO, the RM, the SDIs, the IPIs, and the institute's AWOIs declared in the application.
- The termination functionality can be performed only in application statuses: “Approved” or “Approved on hold”, which means only for valid applications.
- The termination functionality cannot be performed in case the selected application has a “child” application (renewal or supplementary of any type) in the following statuses: “Draft”, or “Pending. (For the description of the status groups, see chapter: [“5.3.1 \(All\) Search application”](#).) The system displays a warning message that the termination of the specific license is impossible and that in order to proceed, the “child” application should either be dismissed (by the CO) or withdrawn (by the RM, the SDI, or the AWOI).
- After the termination of a license, the Form A and their associated objects (license, documents, etc.) are accessible as non-editable. Moreover, after the termination of a license, no change is performed in the existing PDF license.

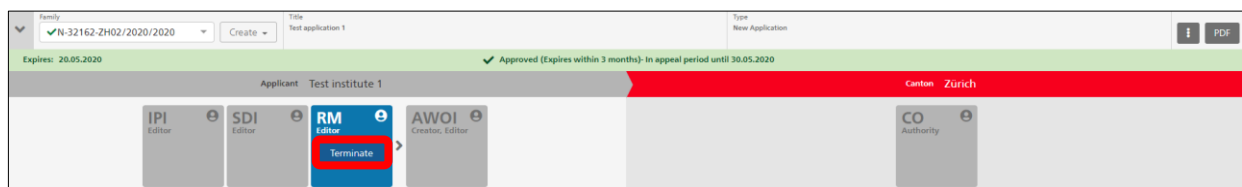


Figure 101 – “Terminate” Form A button

## 5.26 (All) View “Inspections” list

The “Inspections” list of a Form A can be viewed by following the steps below:

1. Navigate to the sticky row of a Form A. See chapter: [“5.3.3 \(All\) Sticky row”](#).






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2. Click on the icon: .

3. Click on the option: "Inspections".

The system opens the pop-up window: "Application inspections".

4. Click on the hyperlink of an inspection document title.

The system downloads the corresponding document.

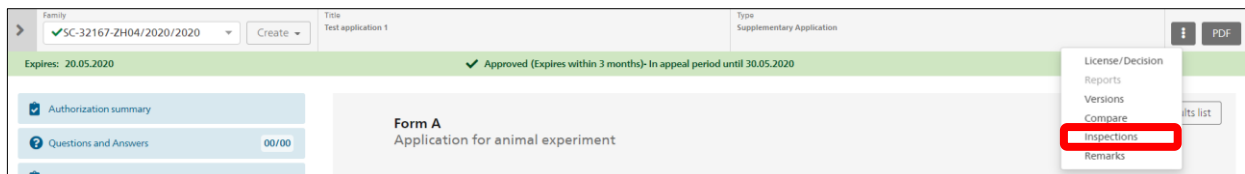


Figure 102 – Form A "Inspections"

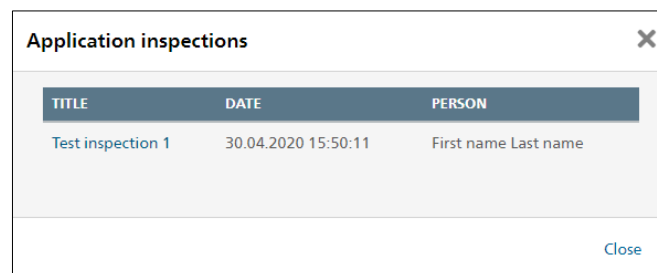


Figure 103 – "Application inspections" pop-up window

## 5.27 (All) Documents

The addition of documents for an application for animal experiment can be executed from four different main areas:

- The **"Documents"** chapter in the left navigation menu of Form A. (Document type: "Application" level). The functionality is described in chapter: ["2.13 Documents"](#).
- The **sections / fields** of Form A, and, more specifically:
  - The **"Animals"** section of Form A. This kind of documents appear in "Documents" chapter with document "Type": "Animals".
  - The **rich-text editor fields** of Form A. This kind of documents appear in "Documents" chapter with document "Type": "Field".

Rich-text editor indicator for addition of documents: 

- The **answer sections** in the **"Questions and Answers"** chapter of Form A. This kind of documents appear in "Documents" chapter with document "Type": "Answer".
- The **"Authorization"** chapter: Authorization documents can be uploaded by the CO in the "Authorization" page. This kind of documents appear in "Documents" chapter with document "Type": "Authorization".



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Only documents with “Type”: “Application” and “Field” can be edited and deleted from within the “Documents” chapter of Form A. All other types are managed from within their corresponding “source” (e.g., specific answer, “Authorization” page, etc.).

The screenshot shows the 'animex-ch' web interface. The top navigation bar includes the Swiss Confederation logo and the text 'animex-ch'. The main content area is titled 'Form A Application for animal experiment'. On the left sidebar, the 'Documents' link is highlighted with a red rectangle. The main content area shows the 'Basics' section with the 'Address of the applicant' field, which includes a dropdown for 'Institute' and a text input for 'Name'.

Figure 104 – Form A “Documents” chapter

The screenshot shows the 'Documents' list in the animex-ch system. The table displays a list of documents with columns for Type, Numéro, Format, Titre, Description, Nom du fichier, Taille en KB, Date, Utilisateur, and Action. The list includes documents for 'Champ', 'Animal', 'Réponse', and 'Demande'.

TYPE	NUMÉRO	FORMAT	TITRE	DESCRIPTION	NOM DU FICHIER	TAILLE EN KB	DATE	UTILISATEUR	ACTION
Champ	20	DOCX	20 - Objective of the experiment.docx	20 - Objective of the experiment and background	20 - Objective of the experiment and background.docx	32	01.05.2020 12:54:09	First name Last name	
Animal		DOCX	Add animal category.docx	Add animal category	Add animal category.docx	32	01.05.2020 12:50:38	First name Last name	
Réponse		DOCX	Answer details.docx	Answer details	Answer details.docx	32	01.05.2020 12:56:38	First name Last name	
Demande		DOCX	Form A.docx	Form A	Form A.docx	32	01.05.2020 12:54:28	First name Last name	

Figure 105 – Form A “Documents” list

## 5.28 Comments

### 5.28.1 (All) View “Comments” list

The “Comments” list of a Form A can be viewed by following the step below:

1. Navigate to chapter: “Comments” of a Form A.
2. Click on the “Comments” chapter.



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The system opens the “Comments” pop-up window with the “Comments” list in descending order (the newest received comment appears on the top of the list).

**Note:** Each comment consists of the following information: the application status (changed to), the author's system role, the author's institute name / canton indicator (e.g., CO – ZH), the author's full name, and the timestamp of creation (date and time).

Figure 106 – Form A “Comments” chapter

Figure 107 – Form A “Comments” list

## 5.28.2 (RM, SDI, AWOI) Create comment

The creation of a comment takes place as a step of the workflow of an application for animal experiment. A comment can be entered before the status of the application changes to one of the following:

- **Mandatory comments:**  
“Submitted”, “Returned for rewrite”, “Resubmitted with rewrite”, “Disapproved”, “Withdrawn”, and “Dismissed”.
- **Optional comments:**



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“Draft pending SDI”, “Draft pending RM”, “Draft pending AWOI”, “Returned for rewrite pending SDI”, “Returned for rewrite pending RM”, “Returned for rewrite pending AWOI”, “Returned for answer”, “Resubmitted with answer”, “Approved”, “Approved on hold”, and “Terminated”.

The RM, the SDI, and the AWOI can create a comment before the status of the application changes to one of the following: “Submitted”, “Resubmitted with rewrite”, “Resubmitted with answer”, or “Withdrawn”. Before the status change to “Terminated”, a comment must be added by the RM.

The RM and the AWOI can create a comment before the status of the application changes to “Draft pending SDI”.

The SDI and the AWOI can create a comment before the status of the application changes to “Draft pending RM”.

The RM and the SDI can create a comment before the status of the application changes to “Draft pending AWOI”.

Moreover, the comments made during the above mentioned institute statuses: “Draft pending SDI”, “Draft pending RM”, “Draft pending AWOI”, “Returned for rewrite pending SDI”, “Returned for rewrite pending RM”, and “Returned for rewrite pending AWOI” are visible only to institute roles of the referenced application.

Figure 108 – Example of mandatory comment in Form A (status change to “Submitted”)

Figure 109 – Example of optional comment in Form A (status change to “Resubmitted with answer”)

## 5.29 “Family” remarks

### 5.29.1 (All) View “Family” remarks list

1. The “Navigate to the sticky row of a Form A. See chapter: [“5.3.3 \(All\) Sticky row”](#).”




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2. Click on the icon: .
3. Click on the option: “Remarks”.

The system displays the “Public” “Family” remarks in descending order (the latest added “Family” remark appears on the top of the list).

**Note:** Each “Family” remark consists of the following information: the type of “Family” remark tag, which is “Public”, the system role, the institute name / canton indicator, the user’s full name, the timestamp of creation / edit, and the attached documents.

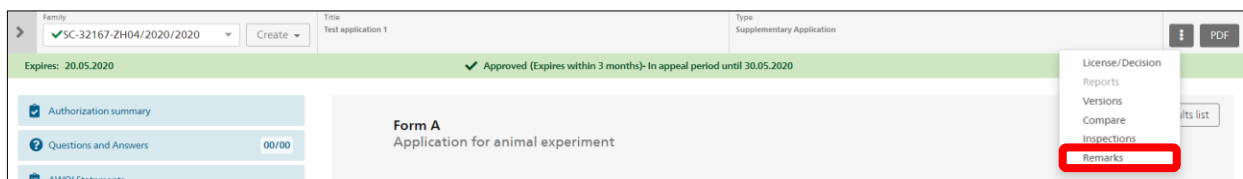


Figure 110 – Form A Remarks

Remarks

Type \*

Comment \*

Add remark

Manage documents (0)

Clear

Public AWOI A koffvojw et wpfi lokqivthtm- First name Last name at 15.03.2020 17:18:46


Remark 1

Close

Figure 111 – Form A “Remarks” list

### 5.29.2 (All) Create “Family” remark

A “Family” remark can be created by following the steps below:

1. The “Navigate to the sticky row of a Form A. See chapter: [“5.3.3 \(All\) Sticky row”](#).”
2. Click on the icon: .
3. Click on the option: “Remarks”.
4. Fill-in the fields.
5. Click on the button: “Manage documents”, in order to add document(s). (This step is optional.)
6. Click on the button: “Add remark”.



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The remark is added in the “Family” remarks list.

Note: The “Family” remarks are not associated with a Form A, but with the entire “Family”. This means that the creation of “Family” remarks is not restricted by the applications of the “Family” or their status. The “Family” remarks are independent of which application of the “Family” is, currently, opened and can be created at any time in an existing “Family”.

Figure 112 – Create remark pop-up window

### 5.29.3 (All) Edit “Family” remark

A “Family” remark can be edited by following the steps below:

1. The “Navigate to the sticky row of a Form A. See chapter: [“5.3.3 \(All\) Sticky row”](#).”
2. Click on the icon:
3. Click on the option: “Remarks”.

The system displays the “Public” “Family” remarks in descending order (the latest added “Family” remark appears on the top of the list).

4. Click on the “edit” icon: , which appears in the last “Family” remark of the “Family” remarks list (the one appearing on the top of the list). The “edit” icon is displayed, only if it is editable for you. See “Notes” for editing rules.
5. Edit the “Family” remark’s text field and / or attach a new document (which replaces the previous one).
6. Click on the button: “Save remark”.

The remark is updated in the “Family” remarks list.

#### Notes:

- The “Family” remarks can be edited when the following rules are true:
  - You are the creator (user and logged-in role) of the “Family” remark.
  - The “Family” remark is the latest created in the “Family” remarks list.
- After editing a “Family” remark, its timestamp is updated in the “Family” remarks list.



## 6 Annex

### 6.1 Master Data Management

The master data are **not** managed by the institute, but by the CO, the FVO, and the AP.

When the CO, the FVO, or the AP adapts a master data entry:

- Only the new value will be present for any new created application.
- For the applications that were in progress before the adaptation of the master data entries, both the old and new value will be presented and the user will be able to choose either the old or the new value.

See examples below:

#### Examples:

- A "Field of study" value is updated. Only the new value will be selectable in the drop-down list of "Field of study" in all applications for animal experiment, which are created, afterwards.
- A new application has been created and saved in the database, using the "Field of study" value: "A\_1". Afterwards, this value is renamed to "A\_2". In the saved application for animal experiment, still, the value "A\_1" will appear in the drop-down list for the "Field of study". But, as the new value must also be available, "A\_1" and "A\_2" will appear in the list when editing this application for animal experiment. The user has the possibility to select either the older one or the newer one. But, for any new application for animal experiment, only the value "A\_2" will be selectable in the drop-down list of "Field of study". After the user has selected the new value "A\_2" and saved the form, then only this new value will appear in the drop-down list.
- There are two different controls for displaying versioned results:
  1. Static drop-down list
  2. Dynamic drop-down list
    - In case of a static drop-down list, like the "Field of study" in Form A, the application behaves as described. The user selects value "A\_2" and can still open the drop-down list and select the value: "A\_1" for as long as the form has not been saved / reloaded. Static drop-down lists are used when the list contains small number of results.
    - For cases of high number of results (like in animal supplier addresses) the system uses the dynamic drop-down list. When the user searches on this list, the system always retrieves the last versioned value of each entry. As a result, if the user selects the version "A\_2" and then immediately tries to search again, the system will only retrieve the value "A\_2" because it is the last version of this entry. This is the reason why the user cannot see the "A\_1" after changing the selection.

However, even in the second case, if the user has not yet saved the value "A\_2", it is still possible to see the value "A\_1" again, by closing and reopening the window / page.