Aperio eSlide Manager 12.3
Research System Administrator

LEARN-BY-DOING TRAINING SERIES

For Research Use Only. Not for use in diagnostic procedures.
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Welcome to Aperio eSlide Manager 12.3: Research System Administrator

Who is this workbook for?  
This workbook is for eSlide Manager administrators who need to know how to set up and manage an eSlide Manager site.

Why this workbook?  
This workbook provides instruction to allow eSlide Manager administrators to perform their specific job functions:

What's in it for me?  
Aperio® eSlide Manager delivers an effective digital pathology information management system that treats high resolution eSlides – that can be viewed, managed and analyzed – as an integrated element in pathology workflow. Aperio® eSlide Manager displays information in context, with gross (macro) images, eSlide images, reports, and other associated documents and images cross-linked and concurrently viewable.

Topics covered in this workbook include how to:
•  Modify system settings for lab specific needs.
•  Create data groups to control user access to groups of data.
•  Create roles to define user permissions and data field access.
•  Create users and assign roles and data groups.
•  Create a list of Projects, Specimen and Slide comments for users to apply.
•  Assign ownership of applications.
•  Control system security.

Security  
Aperio® eSlide Manager manages specimen information in addition to image information. Most of the information useful in managing slides pertains to the specimen rather than to the digital image.

Aperio® eSlide Manager provides a full security system that ensures that users can only access the data they are authorized to see. Aperio® eSlide Manager uses an administrator/user structure that restricts security-sensitive actions to an authorized administrator. The administrator can:
•  set up users with passwords. Users must log into eSlide Manager with a username and password and be authenticated before they can access data.
•  set up user roles that restrict access to certain eSlide Manager commands or data fields.
•  set up data groups that restrict access to data to specific users.
•  set users’ access permissions to grant them full control access, read-only access, or no access to the defined data groups.

eSlide Manager Modes  
Aperio eSlide Manager IVD Mode is only available with the entire closed cleared system (Aperio AT Turbo / CS2, eSlide Manager, and FDA cleared algorithms).

Any version of Aperio eSlide Manager that is not a part of the closed cleared system will not have the option to select IVD.
Terminology

**Administrator:** The system owner/manager who is responsible for the identification and development of the eSlide Manager database infrastructure. The administrator identifies data fields, creates and names fields, configures data tables, sets up user accounts and data groups, sets permission levels, controls account access and establishes backup procedures of data within the organization.

**Data Group:** Classify similar data into categories so that operators can be given access to a category of data. A data group can categorize data by a specific pathologist, sample type, case, or department. Data groups work with roles to define what data an operator has access to.

- **No Access (NA):** User account permission setting that denies all access to any of the eSlide Manager data within a given data group. These data group permissions will not be affected by roles since they have no access to the data.

- **Read Only (RO):** User account permission setting that provides Read Only access to the data within a given data group. The user can only read the data and cannot move or change the data.

- **Full Control (FC):** User account permission setting that allows the user full abilities to change and modify data within a given data group. This includes moving eSlides from one project to another within the data groups where the user has been given full control.

**Data Manager:** The system user responsible for defining workflow and process in collaboration with the Administrator; adds and organizes data and eSlides in eSlide Manager and may manipulate or analyze the data. The Data Manager needs an account with full control over the data groups and data fields that they manage. They can also have some administrator rights.

**Data Table:** Table of data field containing specific pieces of data or variables, which are organized in a hierarchy of parent to child relationships between the data. Multiple fields or variables are associated with a case, a specimen, and/or an eSlide list.

**eSlide:** An eSlide is comprised of a digital image and the associated data (populated into a table). It can contain the label image and a scanned area image of the glass slide. An eSlide can only belong to one specimen.

**Guest:** eSlide Manager automatically includes a Guest user login for access to public information (login = guest, no password). Because the Guest user can cause security concerns in a clinical environment, the Guest user is set to No Access to all data groups by default.

**Project:** The highest level in the data table hierarchy. It is intended for research applications capturing study description, ID, etc.

**Specimen:** The level between the Project and the eSlide in the data table hierarchy. It can contain specimen specific data and the specimen gross image (tumor, organ, etc.) from which the slides were produced. A specimen can belong to only one project.

**Roles:** This feature adds the ability for the administrator to determine what actions and/or functions a user with full control data group permission can perform on that data (i.e. adding, editing, deleting, creating reports, and building hierarchies). Roles can also control what data fields a user has the right to view and/or edit and may grant the user the ability to scan slides, edit data tables, or create data groups.

**User:** User that adds/edits data—a user granted Full Control access to the data group they are assigned but usually has restrictions/permissions to data field through use of a role. User that reviews data and images only—a user granted Read-Only access to the assigned data group (roles can further define what fields can be seen).
What do I need to know before I start?

Data Tables:
- Using the data table hierarchy allows you to associate many slides to a specimen and many specimens to a case.
- Edit data tables to collect only the data you need according to your workflow.

Workflow Alignment

Consider your current workflow before you define data fields, data groups, create users and role permissions.
Define the order, data type, and name of data fields in tables
Create data groups for partitioning data for user groups, departments, sites, etc.
Generate roles (pathologist, researcher, technician, etc.) and define data permissions.
Assign secure usernames and passwords and control user data permissions through data groups, access, and defined roles.
Through roles, user permissions can be further defined (adding, editing, deleting and viewing of data) for the data groups assigned.
1 | Getting Started
About Getting Started

The first time you access Aperio eSlide Manager, change your password and other settings, as needed.

1-1: Log into eSlide Manager

Access Aperio eSlide Manager.

Step summary:

1) Open the eSlide Manager login page.
2) Log in to eSlide Manager.
3) Click Clinical.

1. Open either Internet Explorer or Mozilla Firefox.
   Do not use Google Chrome.

2. Type the URL for your eSlide Manager workstation.
   In the lab, type the URL provided by your system administrator.

3. Enter your Username and Password.

   Good to Know
   Username: Administrator
   Password: scanscope
1-1: Log into eSlide Manager

4. Click **User Login**.

Aperio eSlide Manager **Please Choose a Mode** appears.

5. Click **RUO**.

6. Click **Continue**.

7. Select **Research**.

The eSlide Manager Welcome Page appears.

**Good to Know**

Unless you have purchased the entire closed cleared system your version of eSlide Manager will be RUO and you will not see this screen when logging in.
1-2: View and Modify Settings
If this is your first time logging in to eSlide Manager, review or change your personal settings and change your password.

Step summary:
1) Click Edit my settings.
2) Change your password.
3) Modify settings if desired.
4) Save your work.

1. Click **Edit my settings**.

User Details opens.
1-2: View and Modify Settings

TIP - User Details:
The User Details page allows you to enter or change your information.

You can –
• Enter your phone number
• Enter your email address
• Change your password
• Set your start page
• Change your settings for viewing images.

TIP – Change your Password:
Important: Do not change the password on the Aperio training workstation.

Password requirements are set by the system administrator.

For training the old password is scanscope.

2. Type your Old Password

3. Enter your New Password.
1-2: View and Modify Settings

**TIP – Change Image Viewing Options:**

- **Enable Auto View Images:**
  Select to automatically open specimens or eSlide images by clicking.

- **Display Hover Popups for Images:** Select to see an enlarged view when pointing to thumbnails.

- **Clinical Viewing Mode:** Select to limit ImageScope to the tools commonly used in a clinical setting.

- **Disable Auto-Slide Flipping:**
  Select so the Leica Web Viewer does not automatically flip slide thumbnails in the virtual slide tray after you review the slide.

4. When you finish changing settings, click **Save**.

5. Click **Aperio eSlide Manager**.

The welcome page opens.
2 | Defining Data Tables and Data Groups
Introduction

For each category of data that appears on the main eSlide Manager page, a data table exists that defines what columns are displayed and the titles displayed for the columns. Data Groups allow you to define what data a user can see. If a user does not have access to a data group, the data in that group will not appear on the eSlide Manager page when that user logs in. It is important to fully configure data tables prior to creating roles. If a data field is added after creating roles, the system will automatically grant all roles full control to the new data field. Upon completion of this section the user will be able to:

• Edit tables (project, specimen, and eSlide).
• Add a data group.
• Configure non-data fields.

2-1: Edit the Project Table

The project tables control the appearance of the Project Details page. This task provides instruction on editing the default eSlide Manager case table.

Step summary:

1) Open the Project Table.
2) Adjust the fields.
3) Save changes.

1. Click on Administrative.
2. Select Data Tables.

Data Tables appears.
2-1: Edit the Project Table

3. Click **Project**.

![Data Tables](image)

**Project Table** opens.

4. Click **Order** for **ExternalID**.

![Project Table](image)

**Good to Know**

You can use the Project Table default configuration or modify it for your laboratory’s needs.

**Good to Know**

The assigned Order in this task is instructional. Arrange the items in a way that makes the most sense for your laboratory’s workflow.

5. Select **3**.

![Project Table](image)

The order number for **ExternalID** is updated.

6. Click **Save**.

![Project Table](image)

**Good to Know**

Clicking **Save** applies any changes that were made to the Case Table. In this instance **Patient Name** and **Patient First Name** change places.

The order of **ExternalID** and **Description** changes.
2-1: Edit the Project Table

7. Adjust the order for the rest of the table.

TIP – Vocabulary:

Some columns have vocabulary entries. Vocabulary allows you to define the only answers for a field on the Case Detail page.

Separate vocabulary terms with a pipe symbol ( | ). Do not leave any spaces between the pipe symbol and the surrounding words.
2-1: Edit the Project Table

8. Enter **Vocabulary** for **Status**.

**TIP – Column Order:**

Columns can also be hidden from view on the Project Details page. Set the order to **Not Visible**.

To make a column visible, select the order number for that column.

**TIP – Display Name:**

You can change the display name of a column. This changes the name of the data field in the Project Details page.

You can only change the display name for columns, the column name is set.

9. Click **Save**.
2-2: Add New Columns to a Data Table

If a data table does not have a necessary column, add a new column to any of the eSlide Manager data tables.

Step summary:
1) Enter column information.
2) Click Save.

1. Scroll down to **Column**.

2. Type/Select the information provided.

3. Select the **Image Field** check box.

4. Click **Save**.

A confirmation message appears.

**Good to Know**

One eSlide can have many images associated with it.

When you add columns, an Image Field check box appears in the Slide Data Table, if the user selects **Image Field**, the new data field is available to edit for each image in the eSlides Image area of the detail page.

**Notes:**
- Column Names cannot contain spaces.
- Vocabulary should be a pipe (|) separated list of all columns.
2-3: Edit the Specimen Table

The specimen table controls the appearance of the Specimen Details page. Follow these step-by-step instructions to edit and customize the eSlide Manager default specimen table.

Step summary:
1) Open the Specimen Data Table.
2) Adjust the fields.
3) Save changes.

1. Click Administrative.

2. Select Data Tables.

Data Tables appears.

3. Click Specimen.
2-3: Edit the Specimen Table

Specimen Table appears.

**TIP – Specimen Table:**

The Specimen Table is edited the exact same way you edited the Case Table.

4. For **ImageThumbnail**, change **Order** to **1**.

5. Click **Save**.
6. Adjust the order for the rest of the columns.
### 2-3: Edit the Specimen Table

```
<table>
<thead>
<tr>
<th>GrossDescription</th>
<th>Memo</th>
<th>21</th>
<th>Gross Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MicroscopeDescription</td>
<td>Memo</td>
<td>22</td>
<td>Microscopic Descriptor</td>
</tr>
<tr>
<td>StorageLocation</td>
<td>Text</td>
<td>23</td>
<td>Storage Location</td>
</tr>
<tr>
<td>Status</td>
<td>Text</td>
<td>24</td>
<td>Status</td>
</tr>
<tr>
<td>HospitalAccessionNumber</td>
<td>Text</td>
<td>25</td>
<td>Hospital Accession Num</td>
</tr>
<tr>
<td>Comment</td>
<td>Comment</td>
<td>26</td>
<td>Comment</td>
</tr>
<tr>
<td>DCGID</td>
<td>Foreign</td>
<td>27</td>
<td>Data Group</td>
</tr>
<tr>
<td>Icon</td>
<td>Special</td>
<td>Not Visible</td>
<td>Icon</td>
</tr>
<tr>
<td>ParentId</td>
<td>Identity</td>
<td>Not Visible</td>
<td>Parent</td>
</tr>
<tr>
<td>ParentTable</td>
<td>Text</td>
<td>Not Visible</td>
<td>Parent Table</td>
</tr>
<tr>
<td>Tag</td>
<td>Memo</td>
<td>Not Visible</td>
<td>Tag</td>
</tr>
<tr>
<td>MaskId</td>
<td>Integer</td>
<td>Not Visible</td>
<td>Master Id</td>
</tr>
<tr>
<td>PrevId</td>
<td>Integer</td>
<td>Not Visible</td>
<td>Prev Id</td>
</tr>
<tr>
<td>GlobalId</td>
<td>Text</td>
<td>Not Visible</td>
<td>Global Id</td>
</tr>
<tr>
<td>Column</td>
<td>NewField</td>
<td>Text</td>
<td>Not Visible</td>
</tr>
</tbody>
</table>
```
2-3: Edit the Specimen Table

TIP – Edit the Specimen Table:

To adjust the order to match the example, create 10 new columns:

- Study ID
- Dose (Dose Group)
- Animal ID
- Species
- Animal Gender (Sex)
- Recovery Duration
- Specimen Weight (Specimen/Organ Weight)
- Gross Observations (memo)
- Age
- Weight

7. Click Save.

A confirmation message appears.
2-3: Edit the eSlide Data Table

The eSlide table controls the appearance of the eSlide Details page. Follow these step-by-step instructions to edit and customize the default eSlide Manager Data Tables.

Step summary:
1) Open the eSlide Data Table.
2) Adjust the table.
3) Save changes.

1. Click Administrative.
2. Select Data Tables.

Data Tables appears.

3. Click Slide.
2-3: Edit the eSlide Data Table

The Slide Table is edited the exact same way you edited the Case Table.

Good to Know
2-3: Edit the eSlide Data Table

4. Adjust the order of the columns.

<table>
<thead>
<tr>
<th>Column Name*</th>
<th>Table</th>
<th>Data Type</th>
<th>Order</th>
<th>Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>LabelThumbnal</td>
<td>Image</td>
<td></td>
<td>1</td>
<td>Label</td>
</tr>
<tr>
<td>MacroThumbnal</td>
<td>Image</td>
<td></td>
<td>2</td>
<td>Macro Image</td>
</tr>
<tr>
<td>ImageThumbnal</td>
<td>Image</td>
<td></td>
<td>3</td>
<td>Image</td>
</tr>
<tr>
<td>Id</td>
<td></td>
<td></td>
<td>4</td>
<td>Id</td>
</tr>
<tr>
<td>BarcodesId</td>
<td>Test</td>
<td></td>
<td>5</td>
<td>Barcode ID</td>
</tr>
<tr>
<td>BlockId</td>
<td>Test</td>
<td></td>
<td>6</td>
<td>Block ID</td>
</tr>
<tr>
<td>Stain</td>
<td></td>
<td></td>
<td>7</td>
<td>Stain</td>
</tr>
<tr>
<td>BodySlide</td>
<td>Foreign</td>
<td></td>
<td>8</td>
<td>Body Site</td>
</tr>
<tr>
<td>AnalystResult</td>
<td>(Image)</td>
<td>Special</td>
<td>9</td>
<td>Analysis</td>
</tr>
<tr>
<td>LastJobStatus</td>
<td>(Image)</td>
<td>Test</td>
<td>10</td>
<td>Analysis Progress</td>
</tr>
<tr>
<td>Score</td>
<td>Test</td>
<td></td>
<td>11</td>
<td>Score</td>
</tr>
<tr>
<td>Comment</td>
<td></td>
<td></td>
<td>12</td>
<td>Comment</td>
</tr>
<tr>
<td>Status</td>
<td>Test</td>
<td></td>
<td>13</td>
<td>Status</td>
</tr>
<tr>
<td>ImageId</td>
<td>(Image)</td>
<td>Identity</td>
<td>14</td>
<td>Image ID</td>
</tr>
<tr>
<td>Description</td>
<td>(Image)</td>
<td>Test</td>
<td>15</td>
<td>Description</td>
</tr>
<tr>
<td>ScanDate</td>
<td>(Image)</td>
<td>Date/Time</td>
<td>16</td>
<td>Captured Date</td>
</tr>
<tr>
<td>CompressedFileLocation</td>
<td>(Image)</td>
<td>Test</td>
<td>17</td>
<td>File Location</td>
</tr>
<tr>
<td>DataGroupName</td>
<td></td>
<td></td>
<td>18</td>
<td>Data Group</td>
</tr>
<tr>
<td>EmbedId</td>
<td>Test</td>
<td></td>
<td>19</td>
<td>Slide ID</td>
</tr>
<tr>
<td>ScanScopeId</td>
<td>(Image)</td>
<td>Test</td>
<td>20</td>
<td>Scanscope ID</td>
</tr>
<tr>
<td>Rack</td>
<td>(Image)</td>
<td>Integer</td>
<td>21</td>
<td>Rack</td>
</tr>
<tr>
<td>Slot</td>
<td>(Image)</td>
<td>Integer</td>
<td>22</td>
<td>Slot</td>
</tr>
<tr>
<td>QualFactor</td>
<td>(Image)</td>
<td>Integer</td>
<td>23</td>
<td>Quality Factor</td>
</tr>
<tr>
<td>ScanStatus</td>
<td>(Image)</td>
<td>Test</td>
<td>24</td>
<td>Scan Status</td>
</tr>
<tr>
<td>ScanStatusDetails</td>
<td>(Image)</td>
<td>Test</td>
<td>25</td>
<td>Scan Status Details</td>
</tr>
<tr>
<td>Icon</td>
<td>Special</td>
<td>Not Visible</td>
<td></td>
<td>Report Image</td>
</tr>
<tr>
<td>ReportThumbnal</td>
<td>Image</td>
<td>Not Visible</td>
<td></td>
<td>Analysis Thumbnail</td>
</tr>
<tr>
<td>ParentId</td>
<td>Identity</td>
<td>Not Visible</td>
<td></td>
<td>Parent</td>
</tr>
<tr>
<td>ParentTable</td>
<td>Test</td>
<td>Not Visible</td>
<td></td>
<td>Parent Table</td>
</tr>
<tr>
<td>Folder</td>
<td>Test</td>
<td>Not Visible</td>
<td></td>
<td>Folder</td>
</tr>
<tr>
<td>Interpretation</td>
<td>Test</td>
<td>Not Visible</td>
<td></td>
<td>Interpretation</td>
</tr>
<tr>
<td>IncludeInReport</td>
<td>Image</td>
<td>Not Visible</td>
<td></td>
<td>Include In Report</td>
</tr>
<tr>
<td>ReportDisplayOrder</td>
<td>Image</td>
<td>Not Visible</td>
<td></td>
<td>Report Display Order</td>
</tr>
</tbody>
</table>
2-3: Edit the eSlide Data Table

5. Click **Save**.

A confirmation message appears.
2-5: Configure Non-Data Fields

The Slide Table includes some non-data entry items as fields so you can make items invisible or change where they appear.

Step summary:
1) Click Order for the non-data field
2) Select the desired order number
3) Click Save.

1. Open the eSlide Table.

2. Click Order for LabelThumbnail.


TIP – Thumbnail Settings:

You can also change the Thumbnail settings in the System Settings page. Thumbnail settings assigned in the eSlide Table have a higher priority than settings changed in the System Settings page.

If thumbnails are marked Not Visible in the eSlide Table, they will not appear even if enabled on System Settings.
2-5: Configure Non-Data Fields

4. Click **Save**.

5. Change the **LabelThumbnail** order back to 1.

6. Click **Save**.
2-6: Add a Data Group

Data groups categorize data by user and are usually determined by departments, groups, sites, and/or customers. Using data groups, you can give each pathologist access only to his/her own projects by assigning each pathologists project to a data group and then give each pathologist full control of only that data group.

Step summary:

1) Open Data Groups
2) Click Add
3) Enter the Data Group information.
4) Click Save.

1. Click Administrative.
2. Select Data Groups.

Data Groups appears.

3. Click Add.

Good to Know

eSlide Manager includes three default user groups. Use these or create your own.
2-6: Add a Data Group

Add Data Group appears.

Tip – Add Data Groups:

You can add as many data groups as you need to eSlide Manager.

Create three more data groups with the same user name and description:

- Research Department
- Training
- Amyloid Plaque

4. Click Save.

A confirmation message appears.
2-6: Add a Data Group

Your new **Data Groups** have been added to the list.
3 | Creating and Using Libraries
Introduction
The libraries, stain, body site, and comment, generate a list of choices when entering data on eSlides or specimens. These libraries are created by and added to by anyone granted administrative rights. This section provides instruction on how to:

- Create a body site library.
- Create a library for specific tissue stains.
- Create a comments library.

3-1: Create a Body Sites Library
Generate a list of body sites to choose from when entering specimen or eSlide information.

Step summary:
1) Open Body Sites.
2) Add Body Sites.
3) Save your changes.

1. Click Administrative.
2. Select Body Sites.

Body Sites opens.
3. Click Add.
3-1: Create a Body Sites Library

Add Body Site opens.

4. Enter a **Body Site**.

5. Click **Add**.

A confirmation message appears.
### 3-1: Create a Body Sites Library

6. Repeat to add the following body sites:

- Colon
- Adrenal
- Blood
- Bone Marrow
- Brain
- Breast
- Heart
- Kidney
- Liver
- Ovary
- Pancreas
- Prostate
- Spleen
- Uterus
3-2: Create a Stains Library

Generate a list of stains to choose from when entering specimen or eSlide information.

Step summary:
1) Open Stains.
2) Enter Stains.
3) Save your changes.

1. Click Administrative.
2. Select Stains.

Stains opens.

3. Click Add.
3-2: Create a Stains Library

Add Stain opens.

4. Enter the stain **Short Name**.

5. Enter the **Stain Long Name**.

**TIP – Add Stain:**

The minimum entry to add a stain to the library is the name, short or long. However, enter the information required by your lab.

To save time in this training task, most of the other Add Stain fields are left blank.

6. Click **Add**.
3-2: Create a Stains Library

A confirmation message appears.

7. Repeat steps 3-5 to add the following stains:
   - ER
   - PR
   - HER2
   - Ki67
   - P53
   - Wright
   - EGFR
   - Cytokeratin
   - ER Ctrl
   - HER2 Ctrl
   - Negative
   - PR Ctrl
   - ThioS
   - Amyloid Beta (short name: Abeta)

8. Click Abeta.
3-2: Create a Stains Library

Edit Stain opens.

9. Click **Display Order**

10. Select 9.

11. Click **Add**.

**Good to Know**

*Display Order* determines eSlide sequence. For instance, the stain with Display Order of 1 appears first. eSlide Manager generates display order, but you can modify this.
3-2: Create a Stains Library

A confirmation message appears.

12. Click **Edit** to make changes to the stain.

13. Click **Delete** to permanently remove a stain.

**Good to Know**

Amyloid Beta now appears on the list with **Display Order** of 9. All stains after 9 have been renumbered.
3-3: Create a Comments Library

The eSlide Manager user can use predefined comments wherever a Comments field appears on eSlide Manager pages. Generate a list of comments.

Step summary:
1) Open Comments.
2) Click Add.
3) Enter comment text.
4) Click Save.

1. Click Administrative.
2. Select Comments.

Comments opens.

3. Click Add.
3-3: Create a Comments Library

**Add Comment** opens.

4. Click **Type**.
5. Select **Slide**.

**TIP – Enter a Comment:**

Every comment has a name and text associated with it.

The comment name is a short statement, usually the first few words of the comment text. This is what is typed into the field when adding a comment on a data page.

Comment text is the actual text of the comment. This is what appears when the comment name is entered.

6. Enter the **Comment Name** and **Comment Text**.

7. Click **Save**.
3-3: Create a Comments Library

The comment is saved and a confirmation message appears.

**TIP – Adding Comments:**

You can add as many comments as you need. Comments are sorted by type: Case, Specimen, and Slide

Enter five more comments. Be sure to note the Type for each comment.

- **Comment Name:** Supports
  **Comment Text:** The data appears to support the hypothesis

- **Comment Name:** Control Passed
  **Comment Text:** Assay control PASSED verification

- **Comment Name:** Slide Unreadable
  **Comment Text:** This slide is unreadable

- **Comment Name:** Paraffin Block
  **Comment Text:** Received one paraffin block labeled with specimen information

- **Comment Name:** Sections
  **Comment Text:** Sections from the paraffin block were obtained and stained.

8. Click **Save**.
3-4: Modify Existing Library Items

Libraries provide an existing list of comments, stains, or body sites to select when adding or editing a specimen or eSlide. Follow these steps to modify eSlide Manager libraries.

Step summary:
1) Open the library.
2) Click Edit.
3) Modify the item.
4) Save your changes.

1. Open the Comments library.

2. Locate the item to modify.

3. Click Edit.

Edit Comment opens.

4. Make your changes to the Comment.

5. Click Save.

Good to Know
Correct spelling errors, unclear or confusing comment text, or any other correction that needs to be made.

Delete a library item:

6. Click Delete.
3-4: Modify Existing Library Items

7. Click OK.
3-5: Use Libraries – Add a Project

Libraries provide an existing list of comments, stains or body sites to choose from when adding or editing a specimen or eSlide. When creating a new project, adding a comment using a library speeds up the process and provides consistency to all your projects.

Step summary:
1) Create a Project.
2) Add a Comment.
3) Save your changes.

1. Click Projects.
2. Select Add Projects.

Add New Projects opens.

3. Scroll down and click Comment.
4. Select Supports.

Good to Know

Comments library options appear as a drop down list when you click the Comments field. All the comments that are in the library are available for selection. The entered Comment Name is shown in the list.
3-5: Use Libraries – Add a Project

The full text of the comment appears in the Comment field.

5. Enter the remaining project information.

6. Click Add.

The new project is added to the All Projects list.
3-6: Use Libraries – Add a Specimen

Libraries provide an existing list of comments, stains or body sites to choose from when adding or editing a specimen or eSlide. When entering specimen data, using a library speeds up the process and provides consistency to all your projects.

Step summary:
1) Open a Specimen.
2) Add a Comment and Body Site.
3) Save your changes.

1. Click **Specimens**.
2. Select **Add Specimens**.

**Add New Specimens** opens.

3. Locate **Body Site**.
3-6: Use Libraries – Add a Specimen

4. Enter **b**.

Body sites beginning with “**b**” appear.

5. Select **Breast**.

**Breast** is entered as the **Body Site**.

6. Click **Comment**.
3-6: Use Libraries – Add a Specimen

7. Select **Sections**.

The full text of the comment appears.

8. Enter any remaining specimen data.

9. Click **Add**.
3-7: Use Libraries – Add an eSlide

Libraries provide an existing list of comments, stains or body sites to choose from when adding or editing a specimen or eSlide. When entering eSlide data, using a library speeds up the process and provides consistency to all your projects.

Step summary:
1) Add an eSlide.
2) Add a Comment, Stain and Body Site.
3) Save your changes.

1. Click eSlides.
2. Select Add eSlides.

Add New eSlides appears.

3. Click Stain.
3-7: Use Libraries – Add an eSlide

4. Enter H.

A list of stains with the entered letter opens.

5. Select HER2.

6. Click Body Site.

7. Enter b

A list of Body Sites with the entered letter opens.
3-7: Use Libraries – Add an eSlide

8. Select Breast.

The Stain and Body Site are selected.

9. Click to open the Comment library.

10. Select Control Failed.

The full text of the Comment is shown.

11. Click Add to save the eSlide.
4 | Creating and Assigning Roles
Introduction

User roles define what actions a type of user can perform and what data that user type can see, modify, or delete. Data Groups and Roles work together to fine tune data access for users that use the same user role. The eSlide Manager administrator can define and set of user roles that suit their organization and workflow. Users can be assigned multiple roles, i.e. Pathologist and Study Manager. Upon completion of this section the user will be able to:

- define user roles.
- define what data the user can view or edit at the data field and image level.
- define the hierarchy that each user role will see upon logging in (Research, Clinical, etc.).
- assign key users a subset of administrator functions.
- define who can access the ImageScope console to scan slides.
- define who can annotate and analyze digital slides.

4-1: Add Roles

Aperio eSlide Manager comes with default system roles which cannot be edited or deleted. Any other roles must be created and appear on the list as they are added. You can use a default role as the basis for a new role.

Step summary:
1) Open Roles.
2) Enter Role details.
3) Save the Role.

1. Click Administrative.
2. Select Roles.
4-1: Add Roles

Roles opens.

3. Click Add.

Role Details opens.

4. Enter a Role Name.

Good to Know
Enter Study_Pathologist as the role name. Role names cannot have spaces. Use the underscore (_) to represent a space.
4-1: Add Roles

5. Enter a Role Description.

6. Click Data Hierarchy.
7. Select: Research.

8. Click Initialize With.

10. Click Save.

Good to Know
Enter Reads slides and creates reports as the role description.
4-1: Add Roles

A role is saved and **Command Permissions** opens.
4-1: Add Roles

TIP – Adding Roles:
To add more roles, you must return to the Roles page.
Click Role Definitions to open the Roles page.
Click Add to create another role.
Role Names cannot have spaces. Use a _ between words.
4-1: Add Roles

11. Repeat to add more Roles.

12. All created Roles are added to the Roles list.

Good to Know

Add three more roles:

- **Role Name**: Study_Coordinator  
  **Role Description**: eSlide Manager administration and image analysis  
  **Data Hierarchy**: Research  
  **Initialize with**: _SysAdmin

- **Role Name**: Research_Assistant  
  **Role Description**: Scanning, data entry, prepare slides  
  **Data Hierarchy**: Research  
  **Initialize with**: _Default

- **Role Name**: Lab_Manager  
  **Role Description**: Has some administrative permissions, image analysis  
  **Data Hierarchy**: Clinical  
  **Initialize with**: _Default
4-2: Set Command Operator Permissions

The command permissions control what a user or group of users can/cannot perform in the system. Each role can be aligned with the appropriate permissions to match the user’s respective work activities. The permissions that are shown depend on which eSlide Manager modules are licensed by your site; if you do not have TMA Lab or Genie modules, you will not see permissions for TMA lab or Genie.

Step summary:
1) Open Command Permissions
2) Select a Role.
3) Set the Operator Permissions.
4) Save your changes.

1. Click **Command Permissions**.

Command Permissions opens.

2. Click the arrow to open a list of available **Roles**.
4-2: Set Command Operator Permissions

TIP – Operator Permissions:

You can set permissions for up to five different roles at once. Each role will have its own column of permissions.

Select Senior_Pathologist, StudyCoordinator and Research_Assistant.

3. Under Operator Permissions, click + to expand Projects.

Operator Permissions for Projects appears.

4. Select the Operator Permissions for Projects.
5. Select the Operator Permissions for **Specimens**, **eSlides**, and **Images**.

6. Select the **Operator Permissions** for **Attachments**.

7. Click **Save**.

A confirmation message appears.
4-3: Set Command Administrative Permissions

Allows users to be given specific administrative permissions without granting full administrative permissions. Consider if a role requires key permissions such as scanning, access to calibration reports, manipulation of data groups and tables, and editing of image analysis macros.

Step summary:
1) Open Administrative Permissions.
2) Set permissions for up to five roles.
3) Save your changes.

1. Scroll down to Administrative Permissions.


Good to Know
Administrative Permissions are set exactly like Operator Permissions.
4-3: Set Command Administrative Permissions

3. Set the remaining Administrative Permissions.

4. Click Save.

A confirmation message appears.
4-4: Set Command Workflow Permissions

Workflow permissions give users the ability to control workflow and to collaborate with colleagues.

Most Workflow Permissions are only given to system administrators. In this training, you change three permission parameters.

Step summary:
1) Open Workflow Permissions.
2) Set permissions for up to five roles.
3) Save your changes.

1. Scroll down to Workflow Permissions.

2. Expand all Workflow Permissions.

Good to Know
Workflow Permissions are set exactly like Operator and Administrative Permissions.

Good to Know
Collaboration allows users to work with colleagues outside their lab.
Conferencing allows live discussions with colleagues regarding a slide or specimen.
4-4: Set Command Workflow Permissions

3. Set the **Workflow Permissions**.

4. Click **Save**.

A confirmation message appears.
4-5: Set Data Table Field Permissions

Define whether users can view or edit each data table field. Every role can be configured to allow users or departments to see different views for different projects.

Step summary:
1) Open Data Field Permissions.
2) Set permissions for Project, Specimen, and eSlides.
3) Save your changes.

1. Click Data Table Field Permissions.

Data Table Field Permissions opens.

2. Click + to expand Projects.
4-5: Set Data Table Field Permissions

TIP – Data Table Field Permissions:

Setting the Data Table Field permissions allows you to determine what access to the data each role has.

Set permissions for all data tables: project, specimen, and eSlides.

Each field on the data table has three options:
- Full Control: enter, delete and edit data.
- Read Only: can see the entered data but cannot make changes
- No Access: the data is not available to view or edit.

3. Set Data Table Field Permissions for Projects.
4-5: Set Data Table Field Permissions

- Set Data Table Field Permissions for Specimens.
4-5: Set Data Table Field Permissions

5. Set the Data Table Field Permissions for **eSlides**.

6. Click **Save**.

7. A confirmation message appears.
5 | Adding Users and User Groups
Introduction
Aperio eSlide Manager user roles permit you to fine-tune user access to specific data and eSlide Manager functions. A user role consists of a set of command and data permissions that define what a user can see, edit, delete, and do on eSlide Manager. User role permissions work in conjunction with data group access permissions. If the data group access rights conflict with user roles permissions (example: a user is given Full Control access to a data group, but the user’s role prohibits viewing data in that group), the most restrictive access permission prevails. The eSlide Manager Administrator can define any set of user roles that suit their organization and workflow. Upon completion of this section the learner will be able to:

- create new users.
- assign users to data groups.
- assign user roles.
- hide user roles.
- create and manage user groups.
- set user group permissions.

5-1: Create a New User
New users are created by anyone with the appropriate administrative permissions. Users can be added, edited, or deactivated, but not deleted.

Step summary:
1) Open Users.
2) Enter the user information.
3) Save your changes.

1. Click Administrative.
2. Select Users.

Users opens.

3. Click Add.
5-1: Create a New User

User Details appears.

4. Add a User

Login Name: lpeel
Authentication Type: Spectrum
Full Name: Dr. Linda Peel
Phone Number: 1-760-634-7865
E-mail Address: lpeel@labs.com
Password: lpeel

5. Select Force user to change password at next login.

TIP – User Authentication
Once a user has logged in with their user name and password, they remain logged in until they log off or until their session times out due to inactivity.

While users are logged in, everything they do is authenticated to ensure they are authorized. eSlide Manager or a Lightweight Directory Access Protocol (LDAP) server can provide this authentication.

6. Click Save.

Good to Know
You can give all users the same initial password or assign individual passwords. It is recommended to require users to change their password when logging into eSlide Manager for the first time.

Set an Account Expiration if you have colleagues who require access to eSlide Manager for a limited amount of time.
5-1: Create a New User

Users appears.

7. Click Add.
5-1: Create a New User

8. Add two more Users:

Login Name: lbun
Authentication Type: Spectrum
Full Name: Lao Bun
Phone Number: 1-760-863-9987
E-mail Address: lbun@labs.com
Password: lbun1
Select Force user to change password at next login.

Login Name: hmeyer
Authentication Type: Spectrum
Full Name: Hans Meyer
Phone Number: 1-760-863-9987
E-mail Address: hmeyer@labs.com
Password: hmeyer1
Select Force user to change password at next login.

9. Click Save.
5-1: Create a New User

The Users list opens. All the users added should be displayed.

10. Click [peel].

User Details appears.

Good to Know

The eSlide Manager Administrator can edit user data and permissions in the user details screen.

When the user has groups, roles, and data groups assigned these appear at the bottom of the User Details.

Once a user is created their Login Name cannot be changed.
5-2: Assign a User to a Data Group

Data groups control what data a user can see. The user can choose which data group receives new data. Follow these steps to assign users to data groups.

Step summary:
1) Open Users.
2) Open Data Groups.
3) Edit the Data Group.
4) Save your changes.

1. Click Administrative.
2. Select Data Groups.

Data Groups opens.
5-2: Assign a User to a Data Group

3. Click a Data Group.

4. Select Dr. Linda Peel.

5. Click the right arrow.

Dr. Linda Peel is moved to Assigned User/User Groups.

6. Add any other users to this data group.
5-2: Assign a User to a Data Group

When Users are moved into a Data Group, the default permission setting is No Access.

7. Click to change the Control Level.

8. Select Full Control for all users in Assigned Users/User Groups.

9. Click Save.

Data Groups opens.
5-2: Assign a User to a Data Group

10. Add users to the **Training** data group.

11. Add users to the **Controls** data group.

12. Add users to the **Amyloid Plaque** data group.
5-2: Assign a User to a Data Group

13. Click ** Administrative **.

14. Select ** Users **.

15. Click ** lpeel **.

**User Details** displays the assigned **Data Groups and Permissions**.
5-3: Assign Roles

After you create roles, assign users to the roles.

Step summary:
1) Open User Details.
2) Select a User.
3) Click Edit Role.
4) Assign user to the selected Role.

1. Click Administrative.
2. Select Roles.

Role Definitions opens.
5-3: Assign Roles

3. Click **Study Pathologist**.

   ![Role Details](image)
   
   **Role Details** opens.

4. Select Dr. Linda Peel.

5. Click the **right arrow**.

   ![Assigned Users/User Groups](image)
   
   Dr. Linda Peel is moved to **Assigned Users/User Groups**.

---

**Good to Know**

To add multiple users at one time, press the **Ctrl** key while making your selections.
5-3: Assign Roles

6. Click **Save**.

A confirmation message appears.

Role Definitions appears.

7. Add **Hans Meyer** to the **Study Coordinator** role.

8. Add **Lao Bun** to the **Research Assistant** role.

9. Add **Dr. Linda Peel** to the **Lab Manager** role.
5-4: Hide User Roles

The eSlide Manager administrator can assign multiple roles to users based on the duties they will perform. Any user whose role allows the creation of user roles has the option of whether to choose from all user roles they have created when logging in.

Step summary:

1) Select the User to hide Roles for.
2) Open the User Details.
3) Select the Roles to Hide.
4) Save your changes.

1. Click Administrative.
2. Select Users.

Users opens.

3. Click Ipeel.
5-4: Hide User Roles

User Details for Dr. Linda Peel opens.

4. Scroll down to Roles.

5. Select the check box for each role to be hidden.

6. Click Save.

A confirmation message appears. You are returned to Users.
5-5: Create a User Group

In many projects, multiple users should have the same data access and command positions. Create user groups to assign several users at once to a role or a data group.

eSlide Manager includes several default user groups that begin with an underscore, such as _Everyone. Use these defaults or create your own.

Step summary:
1) Open User Groups.
2) Add a User Group.
3) Assign users to the User Group.
4) Save your changes.

1. Click Administrative.

2. Select User Groups.

User Groups opens.

3. Click Add.
5-5: Create a User Group

User Group Details opens.

4. For **User Group Name**, and **Description**.

5. Select **Dr. Linda Peel** in **Available Users**.

6. Click the **right arrow**.

Dr. Linda Peel is Assigned to the Research Pathologists User Group.
5-5: Create a User Group

7. Click **Save**.

A confirmation message appears.

You are returned to **User Groups**.

8. Click **Add**.

**TIP – Adding User Groups:**

You can add as many User Groups as you need.

Add three more User Groups:

- **User Group Name:** Research_Assistants  
  **Description:** Has Research Assistant role, scanning, data entry, slide preparation.  
  **Add** Lao Bun to the group.

- **User Group Name:** Study_Coordinator  
  **Description:** Has administrator role, admin and data analysis.  
  **Add** Hans Meyer to the group.

- **User Group Name:** Data Entry  
  **Description:** Enters specimen data.  
  **Add** Lao Bun and Dr. Linda Peel to the group.

9. Click **Save**.

A confirmation message appears.

You are returned to **User Groups**.
5-6: Add Users to a User Group

After you create a user group, you might need to add users to it.

Step summary:
1) Open the User Group to modify.
2) Make changes to the group.
3) Save your changes.

1. Click **Administrative**.
2. Select **User Groups**.

User Groups opens.
5-6: Add Users to a User Group

3. Click **AnalysisUsers**.

User Group Details opens.

4. Select **Dr. Linda Peel** and **Hans Meyer**.

Dr. Linda Peel and Hans Meyer are moved to **Assigned Users**.

5. Click the **right arrow**.

6. Click **Save**.
5-6: Add Users to a User Group

A confirmation message appears.

User Groups appears.
5-7: Remove Users from a User Group

User groups are designed to be fluid. Add or remove users from the group at any time as your laboratory needs change. You can also edit the user group name and description.

Step summary:
1) Open the User Group.
2) Remove users from the group.
3) Save your changes.

1. Click Administrative.
2. Select User Groups.

User Groups opens.
5-7: Remove Users from a User Group

3. Click **Research Assistants**.

   User Group Details appears.

4. Select **Hans Meyer**.

5. Click the **left arrow**.

   Hans Meyer is moved to **Available Users**.

   **Good to Know**
   
   Use User Group Details to:
   - change the User Group Name or the Description or
   - remove users from the User Group.

   **Good to Know**
   
   Hold Ctrl to select several users.
5-7: Remove Users from a User Group

6. Click **Save**.

A confirmation message appears.

You are returned to **User Groups**.
5-8: Delete a User Group

Delete a user group that you no longer need. However, before deleting the group, you must unassign all users in that group.

You cannot delete System User Groups since they are used by various internal processes of eSlide Manager and the eSlide Manager Network Applications. System user group names begin with an underscore, such as _Everyone.

Step summary:
1) Open User Groups.
2) Open the User Group Details.
3) Remove all Users.
4) Delete the User Group

1. Click Administrative.
2. Select User Groups.

User Groups opens.

3. Locate the User Group to delete.
5-8: Delete a User Group

TIP – Deleting a User Group:

User groups that can be deleted will have delete listed under Tasks.

Trying to delete a user group with assigned users will produce an error message. Delete any assigned users before deleting a User Group.

4. Click Edit.

User Group Details appears.

5. Select the Assigned Users.

6. Click the left arrow.

There are no Assigned Users in the group.

Good to Know
Hold Ctrl to select several users
5-8: Delete a User Group

7. Click **Save**.

A confirmation message appears.

8. Locate the **User Group**.

9. Click **Delete**.

A confirmation request appears.

10. Click **OK**.

The **User Group** is deleted.
5-9: User Group Permissions

Assigning user groups to specific roles and data groups can result in conflicting permissions for users. Aperio eSlide Manager Administrator uses a hierarchy to determine what a user’s effective permissions are.

You can give a user data access and command permissions several ways:
- directly by assignment to a data groups,
- directly by assignment to a user role, or
- indirectly through assignment to a user group.

**Step summary:**
1) Open User Details.
2) View user permissions

1. Click **Administrative**.
2. Select **Users**.

3. **Users** opens.

4. Click **Ipeel**.
5-9: User Group Permissions

User Details opens.

The user’s effective permissions are shown.

**TIP – Permissions:**

Users can be assigned to multiple data groups with different permission settings.

If there is any conflict between data group permission settings, the user receives the *least* permissive setting.

**TIP – Permissions:**

Permissions that you directly set override any user group settings.

If Dr. Linda Peel’s access to the Research Department data group is directly set to *No Access*, her *Effective Permission* becomes *No Access*.

**TIP – Permissions:**

Since *No Access* was directly set it overrides more lenient, permissions.

This also works if the directly set permission is more permissive than the User Group Permissions.
6 | Setting the Page Display Options
Introduction

Administrators can make changes in eSlide Manager settings to customize the appearance and functionality of eSlide Manager. These changes include setting the page display options. This section provides step-by-step instruction on:

- setting the number of records displayed.
- formatting the data.
- displaying thumbnails on list pages.
- displaying thumbnails on Details pages.

6-1: Set the Display Settings

The display settings control how many records are shown per page, the date format and the news feed. Follow these steps to customize display settings.

Step summary:

1) Open System Settings.
2) Adjust the settings.
3) Save your changes.

1. Click **Administrative**.
2. Select **System Settings**.

Display Settings opens.
6-1: Set the Display Settings

**Display Settings** allows you to set the Login News Feed, the Default Records per Page, and the Data Format.

3. Type 20 for Default Records per Page.

4. Click Date Format.

5. Select your Date Format.

6. (Optional) Type a valid RSS news feed address for Login News Feed.

7. Click Save.

**Good to Know**
To add a news feed to the login page, perform an internet search for "RSS News Feed" and select the appropriate feed.
6-2: Set the Thumbnail Display Settings

Images in eSlide Manager are represented on list and detail pages by smaller versions of the image called thumbnails. You can choose which pages the thumbnails are displayed on.

Step summary:
1) Go to Thumbnail Display Settings.
2) Adjust the Thumbnail settings.
3) Save your changes.
4) Confirm your new settings.

1. Scroll down to Thumbnail Display Settings.

TIP – Thumbnail Display Settings:

**Lists**: A summary display of items such as All eSlides (As List).

**Details Page**: A detailed display about a list item, such as an individual case.

Changing the Label Thumbnail settings only changes the display setting in eSlide Manager. By default, labels are captured and displayed in ImageScope.

Select an item to display it on the Details or List page.

**Report Image Thumbnails** are available if you have the optional eSlide Manager Reporting module.
6-2: Set the Thumbnail Display Settings

2. Set the Thumbnail Display Settings.

3. Click Save.

4. Click eSlides.

5. Select All eSlides (As List).

All eSlides opens.
6-2: Set the Thumbnail Display Settings

6. Confirm that All eSlides displays the Label, Macro Image, and Image Thumbnails, and the correct Number of Records per Page.

7. Click the Slide icon.

8. Confirm that eSlide Details displays the Thumbnail, Label, and Macro Images.
6-3: Enable eSlide Label Viewing in ImageScope

Due to HIPAA privacy requirements, labels are not automatically set to be viewed in ImageScope. To view the labels in ImageScope you must change the settings.

Step summary:
1) Determine which roles need to see labels in ImageScope
2) Open the Role.
3) Make changes to Image settings.
4) Save your changes.

1. Click Administrative.

2. Select Roles.

Roles opens.

3. Locate Study_Pathologist and Click Commands.
6-3: Enable eSlide Label Viewing in ImageScope

Command Permissions appears.

4. Scroll down to **Operator Permissions**.

5. Click + to expand **Images**.
6-3: Enable eSlide Label Viewing in ImageScope

6. Select **View Label View Macro**.

7. Click **Save**.
7 | Adjusting the System Settings
Introduction
The System Settings include the password and login options, global image share, and alert settings, if the Reporting and Compliance modules are installed, the report settings and compliance module options will also be found here. This allows the administrator to configure the system for the laboratory’s specific needs and privacy requirements.

This section covers:
- Global image share and web browser
- Setting password parameters and unlocking users
- System alerts and logs
- Audits
- Managing customer and guest access.

7-1: Set the Global Image Share and Default Web Viewer
The Global Image Share is the location where the eSlide Manager images are stored. You have to tell eSlide Manager where to look for images. The Default Web Viewer is an eSlide viewer that does not need to be installed on the workstation. This option allows you to select the web viewer that eSlide Manager will use if ImageScope is not installed on the workstation.

Step summary:
1) Open System Settings.
2) Enter the image folder address.
3) Save your changes.

1. Click **Administrative**.
2. Select **System Settings**.

**Display Settings** opens.
7-1: Set the Global Image Share and Default Web Viewer

3. Scroll down to **System Settings**.

4. Type the folder address into **Global Image Share**
   - Your instructor will provide this address for you in training.

5. Select your **Default Web Viewer**.

6. Click **Save**.
7-2: Set Password Requirements

The eSlide Manager Administrator sets the requirements for user passwords. The length and complexity of the password can be set, as well as the time duration that a user’s password is valid.

Step summary:
1) Open System Settings.
2) Adjust the Password Requirement Settings.
3) Save your changes.

1. Click Administrative.
2. Select System Settings.

Display Settings opens.
7-2: Set Password Requirements

3. Scroll down to the **Password Requirement Settings**.

**TIP – Password Requirements:**

**Minimum Password Length**: The default length is five characters. Set this value to zero if you don’t want to specify a minimum length.

**Previous Passwords Remembered**: For added security when changing passwords, you can set the system to remember previously used passwords. Your settings will depend on your laboratory requirements.

Selecting the **Require Special Characters** check box will require users to use non-alphanumeric characters, such as !, @, #, $, or & in their passwords.

Set **Max Login Attempts** to zero for unlimited logon attempts. Enter a value to set the number of invalid logon attempts allowed before a user is locked out of the system.

**Prevent Multiple Simultaneous Logins** keeps users from opening more than one eSlide Manager session.

Set **Max Days Between Logins** to zero to prevent user lock out. Enter a value to specify the number of days between logins before a user account is locked.

Use password expiration controls to comply with CFR Title 21.

**Passwords Expiration Time**: After the specified number of days, a user’s password expires. Set this to zero so passwords never expire.

**Password Expiration Warning Time**: Users will be warned before their passwords expire. Set to zero for no warning.
7-2: Set Password Requirements


5. Click Save.
7-3: Unlock User

When a user account becomes locked (for example, exceeding the number of invalid login attempts), the account needs to be unlocked. You can see the lock status for each user in Users.

Step summary:
1) Log in as an Administrator
2) Select the user to unlock.
3) Unlock the user account.
4) Save your changes.

When a user’s account is locked, eSlide Manager displays a message. Only users with administrator privileges can unlock accounts.

1. Log in as an Administrator.

Good to Know
Username: Administrator
Password: scanscope
7-3: Unlock User

2. Click **Administrative**.

3. Select **Users**.

4. Select the **User** to be **Unlocked**.

**Users** opens.

**User Details** opens.
7-3: Unlock User

The Account Lock Status is under User Details.

The Account Lock Status is Locked.

5. Click Unlock.

The Account Lock Status changes to Unlocked.

6. Click Save.
7-4: Set the Alert Settings

There are three different alert settings in eSlide Manager.
- Login alerts notify you about invalid login attempts by users.
- Scan Alerts notify you about problems with scanning and
- SMTP alerts notify you about mail server problems.

Step summary:
1) Open System Settings.
2) Set where Login Alerts are sent.
3) Set where Scan Alerts are sent.
4) Set SMTP Alerts Settings.
5) Save your changes.

1. Click Administrative.
2. Select System Settings.

Display Settings opens:

3. Scroll down to Login Alerts Settings.
7-4: Set the Alert Settings

4. Select where to send alerts for Invalid Login Attempts Go To.

5. Enter the email address of the E-mail Recipient who will get the alerts.

6. Enter the email address of the E-mail Recipient.

TIP – SMTP Alerts:

Enter the requested information to send alerts to a mail server for SMTP electronic mail transmissions.

These are not required fields. Leave the fields blank if you are not using them.

7. Click Save.
7-5: Open, View and Sort the User Event Log

The user account log allows the administrator to view individual user’s activity. Follow these steps to open, view, and sort the user account log.

Step summary:
1) Open Users.
2) Select the User to view and click View Log.
3) Enter the data range to view and click Submit.
4) Sort the Log and review the data.

1. Click Administrative.

2. Select Users.

Users opens.

3. Select the User to view.
7-5: Open, View and Sort the User Event Log

4. Click View Log.

The selected Users Event Log appears.

TIP – User:
You can change the User by clicking the arrow and selecting a different User to view.

TIP – View and Sort the Event Log
The user event log opens with all events for the selected user displayed. To narrow the results, view events for a specific data range.

Enter the starting and ending dates. You must use the date format shown, including entering the time.

Select an Event Result, to display events with similar outcomes.

Select the Event Type you want to view

5. Click Submit.
7-5: Open, View and Sort the User Event Log

Event Data that matches your criteria appears.

6. Click Sort.

Sort Columns appears.

Tip – Sorting Data:

Select the columns to you want to sort by and move them into the selected columns box.

Select Result.

Select Ascending or Descending. Use the + and – to move columns up and down. The higher a column is in the list the higher the priority for scanning.

Click Save to sort the data.
7-5: Open, View and Sort the User Event Log

The data is sorted by **Result**.

An arrow appears next to the column header indicating if sorting is in ascending or descending order.
7-6: Enable Data Auditing and Electronic Signatures

Data auditing and electronic signatures provide more methods of data tracking, securing the access to the data and verifying that the changes were made by authorized personnel. The optional eSlide Manager Compliance module creates audit reports and can also be set to require electronic signatures when changing data.

Step summary:

1. Open System Settings.
2. Set the Compliance Settings.
3. Save your changes

1. Click Administrative.
2. Select System Settings.

Display Settings opens.

3. Scroll down to Compliance.
7-6: Enable Data Auditing and Electronic Signatures

TIP – Compliance:

**Update Auditing Enabled**: allows you to track data additions, changes and deletions in eSlide Manager and display data adds, changes, and deletions in the audit report.

**Access Auditing Enabled**: allows you to track fields viewed by a user and display user views in the audit report.

**E-Signature Enabled**: allows you to require a user to type their username and password when changing the status field on a details page and include status field changes in the audit report.

4. Click **Save**.
7-7: Configure a System Audit Report

Set up a system audit report, view it, and save it.

Step summary:
1) Open Audit Trails.
2) Select the Configuration Table.
3) Select the Filters.
4) Select the Data Type.
5) Display the audit report.

1. Click Administrative.
2. Select Audit Trails.

Audit Configuration opens.
7-7: Configure a System Audit Report

**TIP - Create a new Audit Report.**

Scroll down to the **Configuration** and **Data Tables.**

**Configuration Tables:** includes data that is entered in to eSlide Manager by the administrator.

**Data Tables:** includes data that is entered in to eSlide Manager by users.

Select one or more table to include in the audit.

3. **Select eSlides.**

4. **Scroll down to Filters for Audit Report.**

5. **Enter a Start and Stop Date/Time.**

6. **Select the User.**

7. **Select the type of data to audit.**

8. **Click Display.**

---

**Good to Know**

Audit an individual user or all users.

The date must include a time. Use 00:00:00 to set the time to midnight.

**Good to Know**

Select one or more data types to audit.

- **Inserts:** Data that was added
- **Updates:** Data that has been changed
- **Deletes:** Data that was removed
- **Accesses:** Data that was viewed.
7-7: Configure a System Audit Report

The Audit Report for the selected data appears.

**Tip – Audit Reports:**

Report sections are color-coded:

- **Green:** Data Added (Insertions)
- **Blue:** Data Updated (Updates)
- **Red:** Data Deleted (Deletes)
- **Yellow:** Data Viewed (Accesses)

**TIP – Reset Settings**

Click to

- clear the selections for a new audit report or
- start the current report over.

**TIP - List Saved Reports:**

This allows you to view a previously generated or saved audit report
7-8: Generate a PDF Audit Report

Create and save a report as a PDF (Portable Document Format) document. To create a PDF format report you need the optional eSlide Manager Reporting module enabled.

Step summary:
1) Generate PDF Report
2) Save the report.

1. Click Generate PDF Report, create a report.

2. Save the report to your local or network drive.

Good to Know
Based on your system settings, the PDF report opens or is saved to disk.
7-9: Export an Excel Audit Report

Export the report in CSV (comma-separated values) or the less-common tab-delimited format for viewing and editing with an application such as Excel.

Step summary:
1) Click Export to CSV File.
2) Enter the file information.
3) Create and save the report.
4) Open the report.

1. Click **Export to CSV File.**

   1. **New CSV File** opens

2. **In CSV Name,** type a name for your file.
3. **Select a Delimiter.**
4. **Click Create & Save CSV File.**

   The file is saved.

5. **Click Open/Save Audit.**
6. **Click List Saved Files.**

   This opens the list of previously saved audit files.

**Good to Know**
- Export to CSV File creates a version of the audit report for use in Excel.
- Delimiters determine how the data is separated. **Comma** separates data with commas. **Tab** separates data with tabs.
- Based on your system settings, the report opens in Excel or is saved to disk.
7-10: Set Access for Guests

The guest user on eSlide Manager is a system user and cannot be deleted. You can change the data group access permissions for the guest user. Setting guest user data access to NO ACCESS is important even if eSlide Manager is set so that the Guest Login is removed from the login page since users can log in as a guest by typing Guest as the username and leaving the password blank.

Step summary:
1) Open Users.
2) Open Guest User Details.
3) Set the Guest Command Permissions.
4) Save your changes.

1. Click Administrative.

2. Select Users.

3. Click Guest.

User Details opens.

Good to Know

The guest user has not been assigned to any Data or User Groups. There are no settings to change here.
7-10: Set Access for Guests

Guest access is also managed in Roles.

4. Click Administrative.
5. Select Roles.

6. Click Command Permissions.

Command Permissions opens..

7. Select _Guest.
7-10: Set Access for Guests

8. Set **Operator Permissions**, **Administrative Permissions**, and **Workflow Permissions**.

9. Click **Data Table Field Permissions**.

10. Select **_Guest**.

11. Expand **Projects** and set the permissions for **Guest** (including those not shown here).

12. Click **Save**.