The Pathology Company

Leica BIOSYSTEMS

eSlide Manager

Operator's Guide

Research Use Only

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eSlide Manager Operator’s Guide (Research Use Only)

This document applies to eSlide Manager Release 12.2 and later.

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Disclaimers

- Use normal care in maintaining and using Aperio ePathology servers. Interrupting network connections or turning off servers while they are processing data (such as when they are analyzing eSlides or generating an audit report) can result in data loss.
- This manual is not a substitute for the detailed operator training provided by Leica Biosystems Imaging or for other advanced instruction. Leica Biosystems Imaging Field Representatives should be contacted immediately for assistance in the event of any instrument malfunction. Installation of hardware should only be performed by a certified Leica Biosystems Imaging Service Engineer.
- ImageServer is intended for use with eSlides created by scanning glass slides with the scanner. Educators will use Aperio ePathology software to view and modify eSlides in Composite WebSlide (CWS) format.

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Contents

1 eSlide Manager Overview

This chapter introduces eSlide Manager.

The heart of eSlide Manager is the eSlide, the digital image created by scanning a glass microscope slide.

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 the pathology workflow. eSlide Manager displays information in context, with gross (macro) images, eSlide images, reports, case histories, and other associated documents and images cross-linked and concurrently viewable.

eSlide Manager facilitates instant archival and intelligent retrieval of histopathological data in a searchable, context-sensitive manner. Pathologists and histologists are able to work through an entire case without having to get up to track down case information or to wait for glass slides to be delivered. They can work remotely and collaboratively, initiating automated image analyses and viewing the results, all within eSlide Manager.

Intended Use

For research use only. Not for use in diagnostic procedures.

About This Guide

This guide is intended for eSlide Manager operators who need to know how to use eSlide Manager after it has been installed and set up. For information on how to set up eSlide Manager and perform administrative functions, refer to the *eSlide Manager Administrator's Guide*.

For More Information

For information on accomplishing specific tasks, see the following sections.

Session Options and Setup

Task	See...
Logging into eSlide Manager	*"Start eSlide Manager and Log In" on page 12*
Changing your password	*"Login and Preferences Tips" on page 13*
Resetting your account	*"Login and Preferences Tips" on page 13*
Choosing which eSlide Manager page you see when you log in	*"Login and Preferences Tips" on page 13*
If you scan slides, choosing what data group the eSlides go into	*"Login and Preferences Tips" on page 13*

Using eSlide Manager Data

Task	See...
Viewing data in eSlide Manager	*"Chapter 4: Working with eSlide Manager Data" on page 18* *"Chapter 6: Viewing Images" on page 39*
Using data tables	*"Chapter 4: Working with eSlide Manager Data" on page 18*
Creating a new case	*"Adding Cases" on page 33*
Adding specimens to a case	*"Working with Cases" on page 34*
Adding eSlides to a specimen	*"Working with Specimens" on page 36*
Creating a specimen	*"Adding Specimens" on page 35*
Adding images to a gross specimen	*"Working with Specimens" on page 36*
Creating an eSlide	*"Adding eSlides" on page 37* *"Creating eSlides from Images in a Server Folder or SubFolder" on page 38*
Adding images to an eSlide	*"Adding an Image to an eSlide" on page 37*
Exporting data	*"Exporting Data" on page 29*
Managing image files	*"Chapter 7: Moving, Copying, and Cloning Data" on page 44*
Adding documents to a case or project	*"Adding Attachments to Details Pages" on page 32*
Searching for specific cases, specimens, or eSlides	*"Chapter 8: Searching eSlide Manager Data" on page 49*
Sharing on eSlideShare.com	*"Appendix C: eSlide Sharing" on page 68*

Advanced

Task	See…
Analyzing eSlides	*"Chapter 9: Analyzing Images" on page 55*
Setting up and saving a desktop view of eSlide Manager and other applications	*"Appendix A: Creating a Workspace (Dashboard)" on page 62*
Starting and stopping Aperio ePathology services	*"Appendix B: Managing Aperio ePathology Services" on page 66*

2 Getting Started

Before you can use eSlide Manager, you must first log in. After that, you can choose personal options to tailor the use of eSlide Manager to your preferences.

Start eSlide Manager and Log In

1. Open your Internet browser and in the address box type the URL of the eSlide Manager web site. You can get this address from the person who installed eSlide Manager on your organization's network.

   The Login page displays.

2. Enter the user name and password given to you by the eSlide Manager administrator. Remember that passwords are case sensitive.

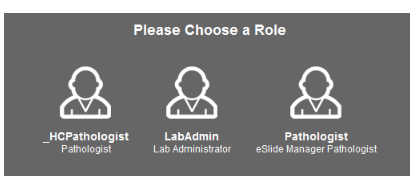
3. Click **User Login**.

   If you do not have a user name, and a Guest Login button displays on this page, click **Guest Login** to log in as a guest user. (The guest user is not available in all configurations.)

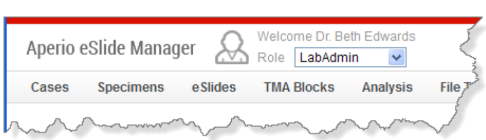
Selecting Your User Role

You might have been assigned multiple user roles by the eSlide Manager administrator. For example, when performing the duties of a pathologist (reviewing cases, annotating tumor regions, performing analyses, reviewing analysis results and scores, and generating reports), you might log in with the Pathologist user role. When performing administrative duties, you might log in with the Laboratory Admin user role.

When you have more than one user role, after logging in you are asked to choose which user role you want log in under. For example:



Click on the role you want to log in with. The top left corner of the eSlide Manager page reminds you which role you have logged in with.



Note that if you have more than one user role, you can use the drop-down list under your name to switch to another user role after you have logged in.

Login and Preferences Tips

The following table gives tips on login options and setting personal options.

If...	Then do this
Your session times out	If while using eSlide Manager you see a message that you have been logged off, your session has timed out and you will need to log in again. If this happens frequently, ask your eSlide Manager administrator to make the session timeout period longer.
Your account is locked	When you log in, if you see a message that your account has been locked, contact the eSlide Manager administrator and ask him or her to unlock your account.
You see a license warning	If you see a warning message when you log in that you are close to exceeding the image or analysis limits of the eSlide Manager license, notify the eSlide Manager administrator so that he or she can remedy the situation.
You see a reminder to change your password	If your password has expired or if for some other reason the eSlide Manager administrator wants you to change your password, when you log in you see a message telling you that you must change your password and you see a New Password box. If your password must be a specific length or contain special characters, you will see a reminder next to the New Password box. Type your new password in the **New Password box** and then retype it in the box below. Click **Save**.
You want to change your password	You can change your password at any time. Go to the **Administrative** menu and select **My Settings**. If your password must be a specific length or contain special characters, you will see a reminder next to the New Password box. Type your old password in the **Old Password** box. Type your new password in the **New Password** box and then retype it in the box below. Click **Save**.
You want to select an eSlide Manager start page	You can choose the eSlide Manager page you will see after logging in. Go to the **Administrative** menu and select **My Settings**. Click the arrow next to the **eSlide Manager Start Page** drop-down list and select the start page you want to use. Click **Save**.
You want to set clinical viewing mode	Clinical viewing mode streamlines viewing and analysis of eSlide images. When you are using clinical viewing mode, viewing an eSlide in ImageScope limits the tools shown and sets the Annotation window to summary view. This allows you to focus on a clinical workflow without being distracted by other general-purpose tools. Go to the **Administrative** menu and select **My Settings**. Select the **Clinical Viewing Mode** check box.

If...	Then do this
You want to set Healthcare Applications options	Two options for the eSlide Manager Healthcare Applications are available on your My Settings page. Go to the **Administrative** menu and select **My Settings**. • **Disable Auto-Slide Flipping –** You can enable or disable automatic eSlide flipping. Automatically flipping the eSlide in the Healthcare applications eSlide tray so that the label is on the right is patterned after the pathologist's practice when using glass slides in a physical slide tray of flipping the slide over after it is read to mark it as having been reviewed. • **Disable Workflow Email Notifications –** The Healthcare applications can email you when a case is waiting your attention within one of the applications such as Case Review or Case Assembly. Use this check box to enable or disable notification.
You want to select a scan data group	If your user role permits you to log into the Console to scan slides, you can choose which data group the eSlides will be added to. Go to the **Administrative** menu and select **My Settings**. Choose the data group you want scanned slides to go into by clicking the down-arrow on the **Data Group for Scanning** drop-down list and selecting a data group.

3 A Tour of eSlide Manager's Main Page

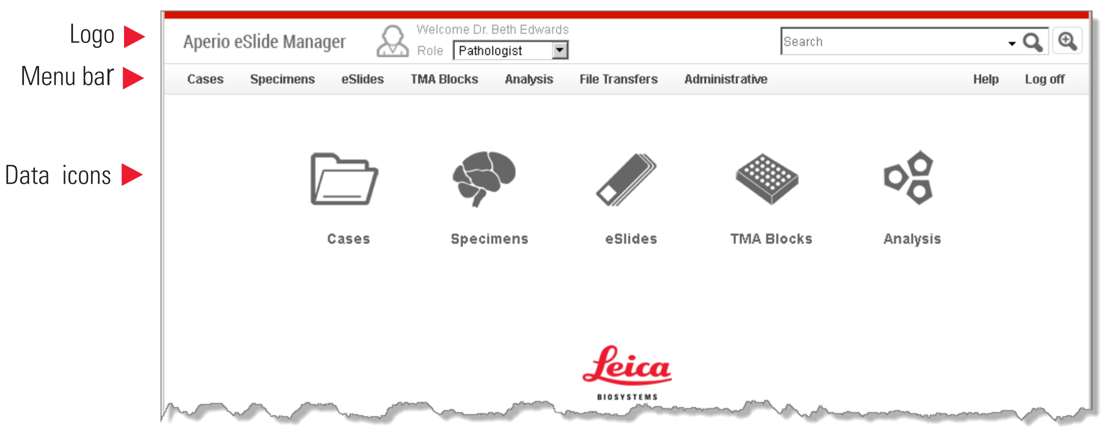
This chapter gives a brief tour of the eSlide Manager main page.

Note on eSlide Manager Appearance

Because eSlide Manager is completely configurable by the eSlide Manager administrator, the data fields and data columns shown in the examples in this guide are representative of just one typical configuration and may not reflect the appearance of your eSlide Manager location.

The Main Page

When you log into eSlide Manager, you see the main eSlide Manager page:



The exact appearance of this page depends on the data hierarchy of the user role you logged in with and on what optional modules might be unlocked. For example, if your user role uses the Research data hierarchy instead of Clinical, the top-level data category is Projects instead of Cases. For information on the different types of eSlide Manager data hierarchies, see *"Chapter 4: Working with eSlide Manager Data" on page 18*.

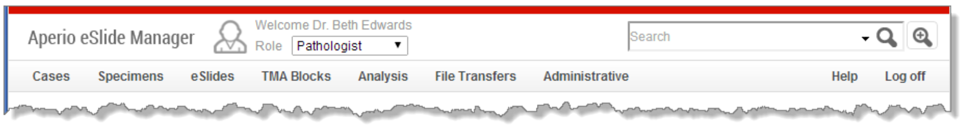
The main features of this page include:

- **Data Icons** – You use the data icons displayed on the eSlide Manager main page to access the information and images stored in eSlide Manager. For example, to see a list of eSlides, click the eSlides icon.
- **Menu Bar** – The commands on the menu bar help you use special eSlide Manager features and access eSlide Manager data in different ways. See the next section for information.
- **Logo** – Click the eSlide Manager logo at the top of the page whenever you want to return to the main eSlide Manager page.

- **Saved Searches** – The Search box at the top of every eSlide Manager page makes it quick and easy to search for any eSlide Manager data. For information on creating and using saved searches, see *"Chapter 8: Searching eSlide Manager Data" on page 49*.

The Page Menu Bar

The eSlide Manager main page contains a menu bar that contains navigation and access commands:



The first menu/menus provide access to your data. The specific data tables you see depend on which data hierarchy is assigned to your user role and which optional modules are unlocked. (See *"How eSlide Manager Organizes Data" on page 18* for information on the different data hierarchies of eSlide Manager.)

The remaining menus provide the following functions:

- **Analysis –** Check the image analysis queue. See *"Chapter 9: Analyzing Images" on page 55*.
- **Administrative –** Use the My Settings command to change your password and set personal preferences. See *"Chapter 2: Getting Started" on page 12*.
- **Network –** Go to the eSlide Manager Network applications licensed for your installation.
- **Help –** Open help for the eSlide Manager page you are on.
- **Log Off –** Log off eSlide Manager.

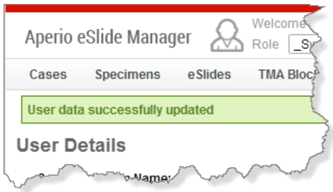
General eSlide Manager Tips

Here are some tips concerning the general operation of eSlide Manager:

- Images created by the Aperio scanner are automatically associated to an eSlide created in the eSlide table. The barcode string populates the eSlide barcode field, and may also fill in other data fields for the eSlide. (This latter feature may require custom software from Leica Biosystems Imaging.) See *"Using Barcodes" on page 20* for more information.
- Gross specimen images captured in the Milestone Grossing Station will automatically be associated with specimens in the Specimens data table.
- Documents can be added to most items in data tables. See *"Adding Attachments to Details Pages" on page 32*.

Status and Error Messages

Whenever you change data on an eSlide Manager page (for example, when adding information to a case, changing a data table, or adding eSlides to a case), a green message lets you know that the update was successful. For example:



After making an update, eSlide Manager returns you to the appropriate page.

When an error occurs, a short, simple error message displays in red on the page where the error occurred. If you want more information on the error (for example, to send the information to Leica Biosystems Imaging Technical Services), holding the cursor over the short error message causes a longer, more detailed message to display.

Monitor Requirements

Because eSlides are, by design, high resolution and information rich, for best results you should use a high quality monitor to view them. Make sure the monitor is at the proper viewing height and in a room with appropriate lighting. We recommend any high quality LCD monitor meeting the minimum requirements discussed in the document *Aperio ePathology System Requirements*.

4 Working with eSlide Manager Data

This chapter describes the features and functionality of eSlide Manager data tables.

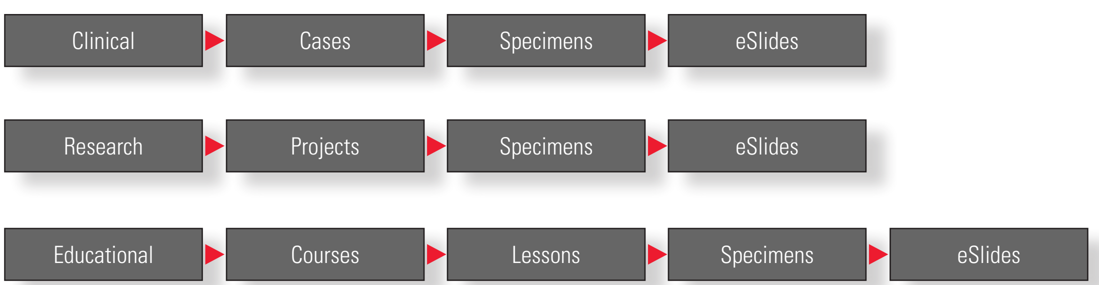
How eSlide Manager Organizes Data

eSlide Manager organizes and displays data in a hierarchy that is tailored to the needs of three different types of users:

- **Clinical–** Data is displayed and organized with cases at the top, followed by specimens and eSlides.
- **Research–** Data is displayed and organized with projects at the top, followed by specimens and eSlides.
- **Educational–** Data is displayed and organized with courses at the top followed by lessons, specimens, and eSlides.

(If your organization has purchased the optional Genie product, a Genie data hierarchy is also available in which data is displayed and organized with Genie projects at the top followed by Genie training sets, specimens, and eSlides.)

Your eSlide Manager administrator has assigned your user role to one of these data hierarchies.



Data Tables

Each item in the data hierarchy is a data table. The highest level in the data table hierarchy is the case/project/course. Other data can be associated with the case/project/lesson, such as eSlides, specimens, documents, and so on. The higher-level data is considered the parent data, and the items associated with it are considered child data. For example, a case is the parent and specimens and eSlides associated with the case are child data.

If you are going to be adding child data to parent data (such as adding eSlides to specimens), the user role you logged in with must have permission to use the child data as well as the parent data, and you must have access to the data group containing both parent and child data.

You can add data to the tables in any order.

Once a slide is scanned on an Aperio scanner, the resulting eSlide and associated image data are automatically added to the eSlide data table. If there is a barcode on the glass slide, it can populate the barcode field with the barcode string;

otherwise, the information fields in the eSlide data table will be empty until you enter data. The eSlide can now be associated with a specimen and case, project or course.

Slide images created by other scanners can also be added to eSlide Manager.

Should you not require the functionality of associating eSlides with specimen and cases or projects, you have the ability to work within just the eSlide table in eSlide Manager to organize your data.

User Roles

A user role defines a type of user based on the data table fields that user needs access to and the eSlide Manager functions that user needs to use. Here are some sample user roles:

- **Lab Supervisor** – Works in the clinical data hierarchy and needs some administrative privileges to add or delete stains or body sites and set up slide-specific processing. This user will need to create algorithm macros as well as analyze eSlides.
- **Pathologist** – Works in the clinical data hierarchy and needs access to cases, needs to run image analysis and generate reports, but will not need to change patient data.
- **Researcher** – Works in the research data hierarchy and needs access to all projects, specimens, and eSlides, but will not scan slides or use administrative privileges.
- **Technician** – Works in the clinical data hierarchy and needs to scan slides and enter patient data, but does not need to create algorithm macros.

If you have questions about the user roles assigned to you, or about which user role you should use, contact your eSlide Manager administrator. It is the administrator who creates the user roles that define what eSlide Manager commands and data operators have access to.

Data Groups

Data groups classify similar data into categories so that operators can be given access to a particular category of data. A data group can categorize data by a specific pathologist, sample type, project or department or whatever grouping makes sense to accommodate your workflow. When you create data, such as when you create a new case, you have the option of selecting which data group the new item belongs to.

Data groups work with user roles to define what data an operator has access to. If an operator doesn't have Full Control or Read Only access to a data group, the data in that group will not appear on the eSlide Manager page when that operator logs in.

Two operators who log in with the same user role may not be able to see and use the same data, if they don't have access to the same data groups.

If your eSlide Manager installation does not use data groups, all data will automatically be assigned to the Default data group.

If you have questions about what data groups are available, or which data groups you should use, contact your eSlide Manager administrator. It is the administrator who creates the data groups and decides what operators have access to which data groups.

Types of eSlide Manager Data Pages

There are two types of data pages in eSlide Manager:

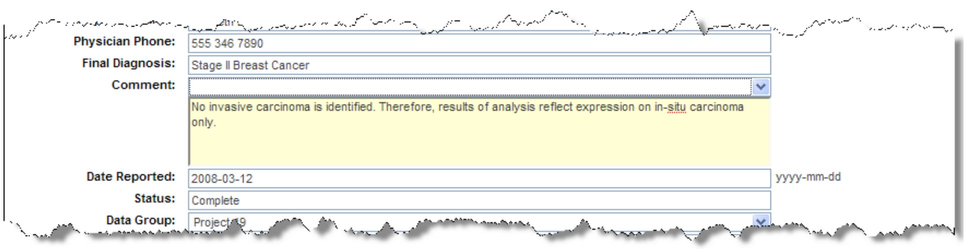
- **List Page –** This page shows a summary of related data. For example, on the Case list page, you see the cases listed. To see more data about a specific case, you need to open the case to see its details page.
- **Details Page –** This page shows details about the selected item. For example, for a case, the details page might show the patient data, the specimens, reports, and eSlides associated with the case.

The following sections discuss how to use list and details pages.

Entering Data in eSlide Manager

On both the list and details pages, you can change or enter data. Here are a few tips.

- All data fields accept alphanumeric input with the exception of date fields, which require a specific format of yyyy-mm-dd (year-month-day), for example: 2008-04-12.
- Once you have changed a field on an eSlide Manager details page, the background of the field turns yellow, indicating you have made a change but have not yet saved it:



  Click the **Save** button on the page to save your change. If you attempt to leave a page before saving a change, eSlide Manager displays a message reminding you to save.

Using Barcodes

eSlide Manager includes support for automating data entry and building data hierarchies using barcodes that are interpreted when the glass slide containing a label with such a barcode is scanned by the Aperio scanner. Decoding some types of barcodes requires some custom work, so contact Leica Biosystems Imaging Professional Services for assistance.

eSlide Manager can decode 2D DataMatrix, 1D 2 of 5, Code 39, and Code 128 barcodes and:

- Place the barcode value into the eSlide Manager barcode field
- Configure and parse the data from the barcode to the specified data table fields and;
- Build the appropriate data hierarchy for that data

For information on enabling this feature, contact your Leica Biosystems Imaging Technical Services representative.

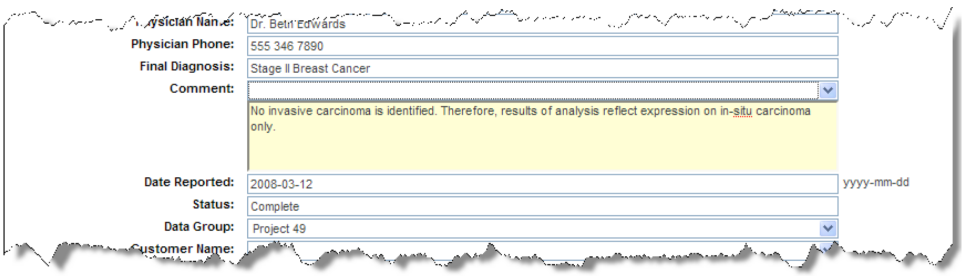
LIS Data Interchange

eSlide Manager includes support for automating data entry by getting data from an LIS (Laboratory Information System) or sending data to it. Interfacing to an LIS requires some custom work, so contact Leica Biosystems Imaging Professional Services for assistance.

Entering Comments

The eSlide Manager administrator may have predefined comments that you can select from when you edit a Comments field. If predefined comments exist, the Comments field becomes a drop-down list from which you can select a comment.

After selecting a comment, the comment text fills in the Comment field:



You can modify the comment text. You can also enter your own text instead of choosing a comment. Click **Save** to save the comment.

Entering a Reason for Change

If your eSlide Manager location uses the optional eSlide Manager Compliance module to audit data changes, you may be asked to enter a reason when you make a change on a details page:

Select a reason for the change from the drop-down list (optionally including a comment), and click **Submit**. Note that you can also enter a free-form comment in the Comment field before clicking Submit.

Entering an Electronic Signature

If your eSlide Manager location uses the optional eSlide Manager Compliance module to audit data changes and electronic signatures are enabled, and you are not logged in as an administrator, you are asked to enter an electronic signature when you change the status of a case or project on a Case or Project Details page:

Type your eSlide Manager user name and password into the boxes and click **Sign**.

Choosing from a Predefined List

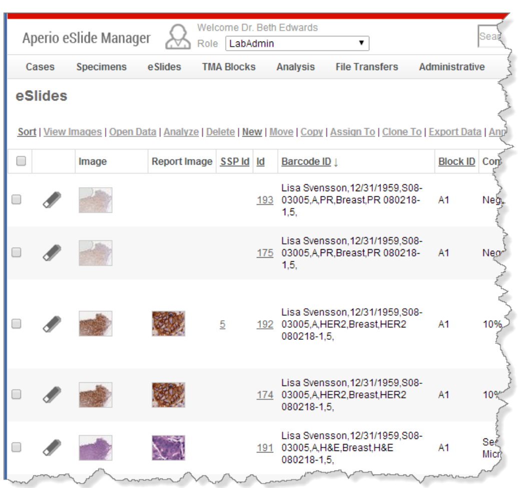
If a data field contains a drop-down list of choices, you must select one for that field. The eSlide Manager administrator decides whether a field will have a predefined list of choices.

(The eSlide Manager administrator decides whether “blank” is one of the predefined choices.)

Working with List Pages

List pages exist for eSlide Manager data tables, such as projects, specimens, cases, lessons, and eSlides. To get to a list page, click a data icon on the main eSlide Manager page or select a command from the menu bar at the top of the eSlide Manager page.

Here is a sample list page for eSlides:



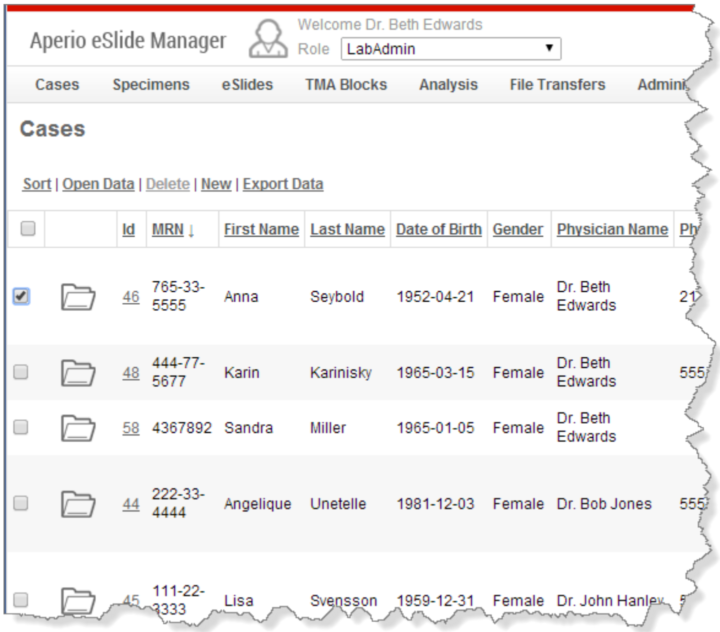
Here are some tips on working with the eSlide Manager list page.

- You can search for specific data, such as cases or eSlides, by using the Search box at the top of the page. See *"Chapter 8: Searching eSlide Manager Data" on page 49* for details.
- You may access all data tables (Case, Specimen, eSlide, etc.) from the menu bar or from the data icons on the main page.
- Functions at the top of the list apply to all items selected in that list. You must select one or more items to enable the commands at the top of the list.
- The icon (for example, for cases, projects, or courses) to the left of an item in a list will open data. Or, selecting the check box for one or more items in a list and then clicking **Open Data** displays the data associated with the selected items.
- If you want to prevent automatically launching a viewer to view an image when you open an item (if an image is associated with that item), see *"Disabling Automatic Image Viewing" on page 41*.
- Clicking any header in a column in a data table sorts the list based upon that column title.
- If child data is associated with parent data in eSlide Manager, when you open the parent, you will be able to see the child data. For example, if you open a case that has a specimen and eSlides associated with it, you see the associated specimens and eSlides on the case details page.
- If you want to bulk-edit information on multiple items, select the box to the left of each item and click **Open Data** at the top of the list. This displays a details page. Any data entered at this time applies to all of the items selected.
- Data can be exported from any table to an Excel file by clicking **Export Data** at the top of the table. The export file will contain the data contained on that page for that data table level only. See *"Exporting Data" on page 29*.
- There are two ways of viewing eSlide Manager data—as *lists* or *folders*. The default view is list view. Using folder view provides another way to see your data grouped in the way that is most useful to you. See the next sections for details.

List View

To use list view, go to a data table in the menu bar and click the **(As List)** option or click the appropriate data icon on the main eSlide Manager page.

The list view displays:



You can temporarily change the number of items to display whenever using a page by typing a new number in the Display field, which displays at the bottom of the page.

This is especially useful when you want to tag a large number of items or, alternatively, quickly view short lists.

Folder View

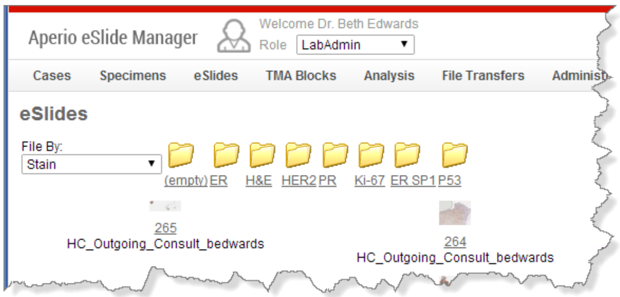
To use folder view, go to a data table in the menu bar and click the **(As Folders)** option.

Folder view is a virtual grouping of your data. Using folder view does not create disk folders or move your data into folders.

The folder view displays, with data organized by data group.

Now click the **File By** drop-down list to select how you want to group the data (in this case, we want to group by the stain used for the eSlide).

Now you see the new folder view with virtual folders grouping your data:

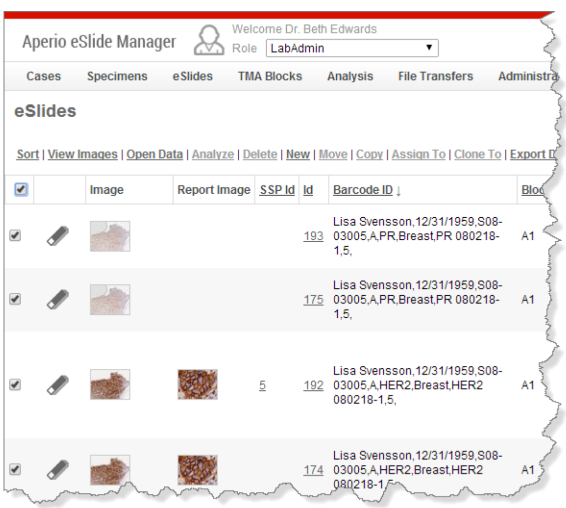


Click on a virtual folder to see what data has been grouped in it.

You can continue refining the folder view by selecting additional criteria.

List Page Commands

At the top of the data list are several commands which become active when one or more items are selected. Selecting the check box in the upper left corner of the list selects all items in the list.



The commands you see at the top of the list page depend on the data table you are viewing and also on the command permissions allowed by your user role. For example, if the user role you logged in with does not allow copying images, you will not see the Move or Copy commands at the top of the eSlide list. Contact your eSlide Manager administrator if you feel your user role does not have the correct permissions.

To sort the page by a particular column entry, click the column title. To sort it in the opposite direction, click the column title again. (The arrow next to the column title changes direction depending on the order in which it is sorted.)

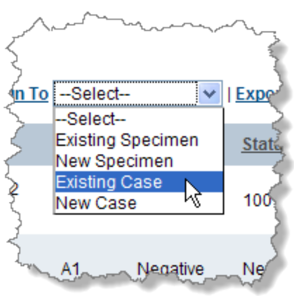
The commands available are:

- **Sort –** In addition to the simple, single-column sort discussed above, you can also use the Sort command to perform a multi-column sort. See *"Multi-Level Sort on a List Page" on page 27*.
- **Open Data** – Open the details page which contains information about the item, including information on specimens and eSlides it is associated with. For information on using the details page, see *"Working with Details Pages" on page 31*. If you select multiple items before using this command, you go to a details page that applies to all of the items; making changes on this details page changes all of the selected items. If you select a single item before using this command, changes on the details page affect only the selected item.
- **Delete** – Use this command to delete the selected items. If used on the list page for parent data (for example, cases or projects), this also deletes related specimens and eSlides.

  If you do not want to delete eSlides and specimens associated with a case or project, you must first disassociate them from the case/project before deleting it. See *"Unassigning eSlides and Specimens from Parent Data" on page 27*.
- **New** – You can create one or more items. You may enter the number of cases to add. This allows you to bulk-create multiple items that may share some information. Then each item can be opened individually to add the information that is different.
- **Export Data** – See *"Exporting Data" on page 29* for information.
- **View Audits** – If your eSlide Manager location uses the optional eSlide Manager Compliance module, and if your user role permits viewing data audits, the View Audits command also displays on the list page. See the *eSlide Manager Administrator's Guide* for information on data audit reports.

If you are using a list page for items that have images associated with them, you may also see additional commands:

- **View Images** –View all selected images in ImageScope. See *"Chapter 6: Viewing Images" on page 39* for details.
- **Analyze** – You can analyze the selected eSlides using Leica Biosystems Imaging image analysis algorithms. For details, see *"Chapter 9: Analyzing Images" on page 55*.
- **Move, Copy, Clone To** – See *"Chapter 7: Moving, Copying, and Cloning Data" on page 44*.
- **Annotations** – Importing and deleting annotation layers are functions used with eSlides primarily when setting up validation studies, in which you want each eSlide to have the same annotations.
- **Assign To** – You can assign an item to parent data, such as assigning an eSlide to a case or specimen. Click **Assign To** and choose the applicable parent data to add the item to.



You must have Full Control permission to all data groups that belong to child data (such as Specimens or eSlides) that you will be associating to parent data such as Cases or Projects.

You then see a list page showing all parent data the item can be assigned to. Optionally use the Filter settings to fine-tune the list. Click **Select** next to the parent data you want to assign the item to.

Unassigning eSlides and Specimens from Parent Data

Deleting a case, project, or course deletes any eSlides and specimens associated with that item. If you want to retain those items, you must first unassign them from the parent data before deleting the case/project/course.

Unassigning an eSlide or specimen does not delete it, but simply disassociates it from the parent data.

To unassign an eSlide or specimen:

1. Go to a list page for that item's eSlides list or specimens list (see *"List View" on page 23)*.
2. On the list page, select the item you want to unassign.
3. Click **Open Data** at the top of the list to open the details page for that item.
4. In the Specimens section of the details page, select the specimens or eSlides you want to unassign.
5. Click the **Unassign** command at the top of the appropriate list.

Now you can delete the case/project without deleting the specimens or eSlides associated with it.

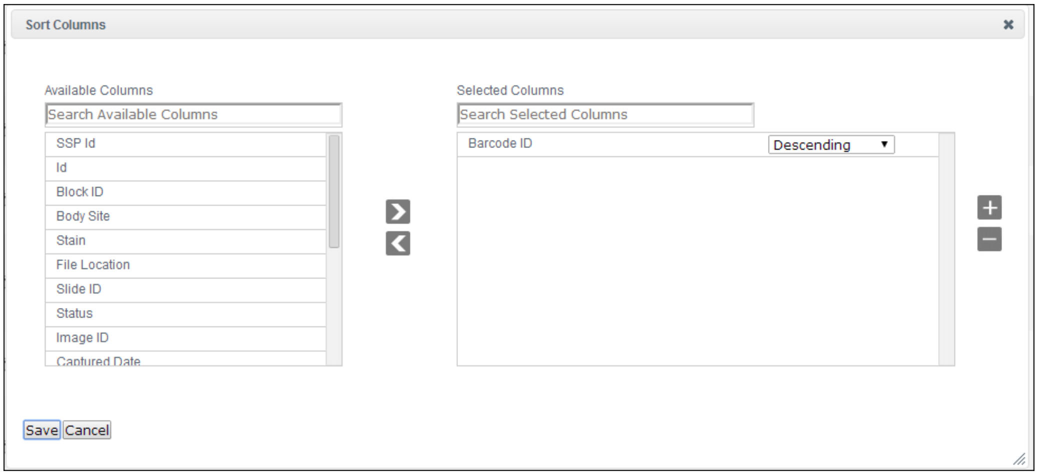
Multi-Level Sort on a List Page

The multi-level sort allows you to quickly arrange data on a list page. You can sort on multiple columns—for example, sort a list of specimens by body site, and then within the results of that sort, sort on specimen procedure.

To use the multi-level sort:

1. Go to an eSlide Manager list page (such as the Specimens page, the eSlides page, or so on).
2. Click the **Sort** command that displays at the top of the data list.

3. You now see a Sort Columns window similar to this:



The exact column titles you see depend on the configuration of your eSlide Manager location and the list page you are on.

4. To select the first column on which to base your sort, click a column title in the left-hand pane and use the **>** arrow button to move it to the right-hand pane, the Selected Columns pane. Or, drag it from the left-hand pane to the Selected Columns pane.

5. Use the **Ascending/Descending** drop-down box to select whether the data will be sorted in ascending or descending order.

6. You can continue to add column titles to the Selected Columns pane. eSlide Manager will first sort on the first column title in the Selected Columns pane, then on the next column title in that list, and so on.

   To change the sort priority of the selected columns (for example, if you have Body Site listed first followed by Procedure, but instead want to sort by Procedure and then Body Site), select a column title in the right-hand pane and use the **+** and **–** buttons to change its position in the list. The + button moves the column title up in the list, increasing its priority; the – button moves the column title down the list, decreasing its priority.

7. To search for a specific column title, start typing in the **Search Available Columns** or **Search Selected Columns** boxes. As you type, the list of columns is filtered based on the characters you enter.

8. To remove a column from the Selected Columns pane, use the **<** button or drag it to the left-hand pane.

9. When you are satisfied with the arrangement of the sort columns, click **Save** to save your settings or click **Cancel** to leave the Sort Columns page without saving your settings.

Sorting Tips

- Sort settings are saved per user for a single list page. When you save the sort settings, then log in again, the sort settings remain in effect for that list page.
- If you click on a single column title on the list page, you will sort only on that column's contents. And you see a message letting you know that you are modifying your saved multi-level sort selections to use only the selected column.
- Results from the Advanced Search are displayed using the sort settings for the applicable list pages.

- You can select only one of this group of column titles to sort on: Body Site, Data Group, Customer Name, and Genie Project Name. If you try to select more than one column from this group, you see an error message.

Exporting Data

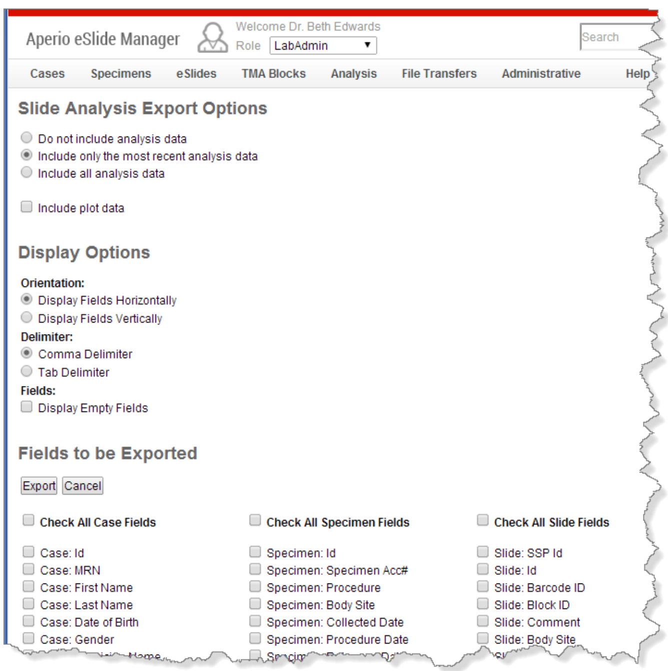
eSlide Manager provides the ability to export data into an Excel-compatible CSV (Comma Separated Value) or tab-delimited file.

If Microsoft Excel is installed on your workstation, you can open the exported data directly in Excel. If you don't have Excel on your workstation, you won't be able to open the file directly, but you can save it to open later using a text editor, like Notepad, or move it to another workstation that does have Excel installed.

When you select one or more items on an eSlide Manager list page or a list section of a details page, the Export Data command is enabled at the top of the data list.

To export eSlide Manager data:

1. Select one or more items on an eSlide Manager list page and click **Export Data**. The Export Options page displays:



   The specific options you see depend on the type of data you are trying to export. For example, if you are exporting eSlide data, you see eSlide Analysis Export Options, but if you are exporting case data, you see only Display Options and Fields to be Exported.

2. Choose the options you want to use:

   a. **Slide Analysis Export Options –** If you are exporting eSlide data, these options allow you to select whether image analysis results will be included in the export. If the analysis algorithm you used supports result plots, you can optionally select **Include plot data** to see that data in your export.

   b. **Orientation –** These options allow you to choose the layout of the exported file. On eSlide Manager list pages, the columns identify the type of data (for example, Status or Image ID), while the rows contain the data fields for an item (for example, an eSlide). These options allow you to choose whether the exported data fields will be arranged in rows (horizontally) or columns (vertically). Note that Microsoft Excel has limits on the number of columns and rows it will accept—refer to the user documentation for your version of Excel for details.

   c. **Delimiter** – Do you want the data in the export file to be separated by commas or tabs? This depends on the application you will be using to format the data.

   d. **Fields** – Select whether you want empty fields to be exported.

   e. **Fields to be Exported –** Select which data fields you want to export.

3. Click **Export.** eSlide Manager creates a commas-separated or tabs-separated file containing the exported data. Your browser displays a window that asks if you want to open the file in Microsoft Excel or save it to your disk.

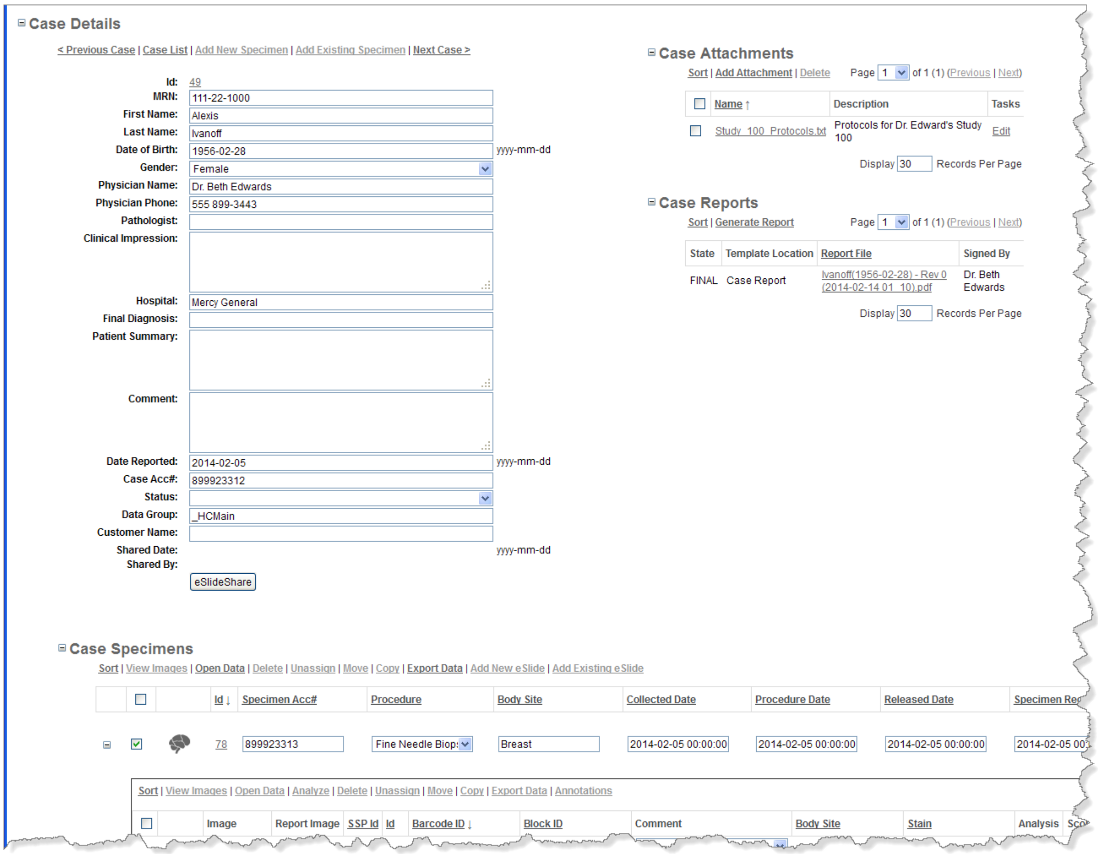
   The first time you export a CSV file, your Internet browser may ask you to select the program with which to open the CSV file. If you have Excel on your workstation, select Excel or you can save the file directly to disk and open it later.

To open the exported file in Excel:

1. Start Excel.
2. Go to the Excel **File** menu and select **Open**.
3. Navigate to the exported file and open it.

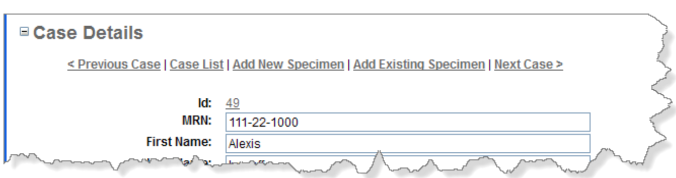
Working with Details Pages

When you open an item on a list page, you see a details page that contains information on all data associated with that item. eSlide Manager attempts to keep all the information on an item right at your fingertips. For example, this Case Details page shows information on the case, and on all specimens, and eSlides associated with the case:



Navigating Details Pages

Typically, links at the top of the page allow you to move back and forth between other items on the list page, return to the list page, or act on this data item:



Additional Features of Details Pages

In addition to containing information about the eSlide Manager item, such as case/project/lesson, the details page also contains information on the data associated with this item, such as eSlides and specimens.

You can also see information on documents attached to this eSlide Manager item, such as study protocols and biopsy details, and reports.

For information on the optional eSlide Manager Reporting feature, see the *eSlide Manager Reporting User's Guide*. See the next chapter for examples of using details pages to create a complete set of related data.

Adding Attachments to Details Pages

Examples of items to attach to eSlide Manager data include a spreadsheet that contains study protocols, a biopsy report, and so on.

1. To add a document to a case (project, course or lesson), specimen, or eSlide, open the item of interest. List cases (projects, courses or lessons) or specimens, select the item of interest and click **Open Data** at the top of the list.
2. In the Details page, go to the Attachments section and click **Add Attachment**.
3. On the Add Attachment page, click **Browse** to navigate to the document.

   You may enter a document description if desired.
4. Click **Upload** to add or **Cancel** to exit.

eSlideShare Sharing

eSlideShare is an innovative sharing network on which you can share your cases, projects, and courses with others. If the user role you logged in with has eSlideShare sharing enabled, you see an eSlideShare button on the details page. (If you don't see this button and wish to use eSlideShare, contact your eSlide Manager administrator for assistance.) For information on how to share your data and images on eSlideShare.com, see *"Appendix C: eSlide Sharing" on page 68*

5 Adding Data to eSlide Manager

This chapter discusses several ways to add data to eSlide Manager.

The examples in this chapter use cases. Many of these procedures also apply to projects, courses, lessons, eSlides, or specimens.

One of the strengths of eSlide Manager is its flexibility. You can arrange your data in any way that suits your organization. Some researchers prefer not to set up projects and specimens, but only use the eSlide list. Other users wish to set up a case for each patient with all documents, eSlides, and specimens associated with that case.

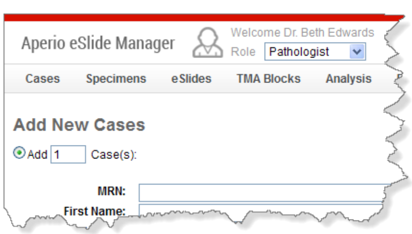
This chapter shows several different ways to add data to eSlide Manager.

Leica Biosystems Imaging Professional Services is available for a fee to assist you with designing your eSlide Manager data organization.

When adding child data to parent data in eSlide Manager, you must have Full Control to both the child's and the parent's data groups and your user role must permit adding data. For example, if you add a new eSlide, you must have Full Control permission to the data group containing the image that will be associated with that eSlide. If you only have Read Only access to the Default data group and you try to add that image (from the Default data group) to a new eSlide that you created, you see the message: "User not authorized to edit current parent data." If you see this message, contact the eSlide Manager administrator and ask to have your user permissions adjusted.

Adding Cases

1. From any eSlide Manager page, go to the **Cases** menu and click **Add Cases**.
2. On the **Add New Cases** page, enter the number of cases to be added in the **Case(s)** box.



3. Enter the appropriate information in the text boxes.

If more than one case is added, the data entered in the fields below will apply to each case created.

4. Select the appropriate **Data Group** to assign the case to.
5. Click **Add** to add the case(s) or **Cancel** to exit.

If you are going to create many new cases that have some similar information (they all have the same physician, for example) you can create all the cases at once, entering the data they have in common, and then go back to each case individually to enter the data that is different.

If your eSlide Manager location is set up to create cases automatically when a slide is scanned, and then to fill in the case with data from the slide barcode, you can skip this step.

Working with Cases

If you want to..	Do this…
Create and add a specimen to a case	1. Under the **Cases** menu, click **All Cases (As List)** to go to the Cases list page. You can also search for a case by using the Search box at the top of the page and entering a unique identifier to locate the case (see *"Chapter 8: Searching eSlide Manager Data" on page 49*). 2. In the Cases list, click on the icon or select the check box next to the case and click **Open Data** at the top of the case list. 3. At the top of the Case Details page, click **Add New Specimen**. 4. On the Add New Specimens page, enter the number of specimens to be added in the **Add Specimen(s)** box. Enter the appropriate specimen information. If more than one specimen is added, the data entered in the fields will apply to each specimen created. 5. Click **Add** to save the information and exit.

If you want to..	Do this...
Add an existing specimen to a case	1. Under the **Cases** menu, click **All Cases (As List)** to go to the Cases list page. You can also search for a case by using the Search box at the top of the page and entering a unique identifier to locate the case (see *"Chapter 8: Searching eSlide Manager Data" on page 49*). 2. In the Cases list, click on the icon or select the check box next to the case and click **Open Data** at the top of the case list. 3. At the top of the Case Details page, click **Add Existing Specimen**. Only unassigned specimens are listed. You can use the filter options to fine-tune the list of specimens shown to find the one you want. 4. Select the check box next to the appropriate specimen in the **Unassigned Specimens** list and click **Assign**.

Adding Specimens

1. From any eSlide Manager page, go to the **Specimens** menu and click **Add Specimens**.
2. On the **Add New Specimens** page, enter the number of specimens to be added in the **Specimen(s)** box.
3. Enter the appropriate information in the text boxes.

   If more than one specimen is added, the data entered in the fields below will apply to each specimen created.
4. Select the appropriate **Data Group** to assign the specimen to.
5. Click **Add** to add the specimen(s) or **Cancel** to exit.

Working with Specimens

If you want to..	Do this...
Add an image to a gross specimen	1. In the Case Specimens portion of the Case Details page, click the icon or select the box to the left of the specimen and click **Open Data**. 2. In the Specimen Details section, go to the Gross Images section and click **Add Image**. 3. Select **Reference an image** or **Upload images** to add an image to the specimen. Your administrator may have configured eSlide Manager to not display the **Reference an image** selection. When referencing an image, click **Browse** to select the image file from a location accessible to the eSlide Manager server. These images can be any size. Click **Add** to add the image. When uploading an image, click **Select Images** to browse to an image on your workstation. The image cannot be larger than 2GB. Click **Open** to upload the image.
Create and add an eSlide to a specimen	The specimen does not have to be in a case to add an eSlide to it. You may directly add eSlides to a specimen and omit the case level if you wish. In this example, however, we will choose a specimen that is in a case. 1. Open the case of interest by searching or listing the cases, selecting the case, and clicking **Open Data**. 2. In the Case Specimens portion of the Case Details page, click the icon or select the box to the left of the specimen and click **Open Data**. 3. In the Specimen Details section of the Case Details page, click **Add New eSlide**. 4. On the Add New eSlides page, enter the number of eSlides to be added. 5. Enter the appropriate eSlide information. If multiple eSlides are created, the information entered will apply to all of them. 6. Click **Add**. For information on adding scanned images to eSlides, see *"Adding an Image to an eSlide" on page 37*.

If you want to..	Do this...
Add an existing eSlide to a specimen	The specimen does not have to be in a case to add an eSlide to it. You may directly add eSlides to a specimen and omit the case level if you wish. In this example, however, we will choose a specimen that is in a case. 1. Open the case of interest by searching or listing the cases, selecting the case, and clicking **Open Data**. 2. In the Case Specimens portion of the Case Details page, click the icon or select the box to the left of the specimen and click **Open Data**. 3. In the Specimen Details section of the Case Details page, click **Add Existing eSlide**. You see a list of unassigned eSlides. 4. Select the boxes to the left of the eSlides you want to add to the specimen and click **Assign**.

Adding eSlides

When you use an Aperio scanner to scan a glass slide, an eSlide is automatically created and sent to your eSlide Manager installation where it appears in the eSlide list page.

1. From any eSlide Manager page, go to the **eSlides** menu and click **Add eSlides**.
2. On the **Add New eSlides** page, enter the number of eSlides to be added in the **eSlide(s)** box.
3. Enter the appropriate information in the text boxes.

   If more than one eSlide is added, the data entered in the fields below will apply to each eSlide created.
4. Select the appropriate **Data Group** to assign the eSlide to.
5. Click **Add** to add the eSlide(s) or **Cancel** to exit.

Adding an Image to an eSlide

You can add an image to an eSlide by going to the eSlide Details section of several different detail pages, such as a Case Details page, an eSlide Details page, or a Specimen Details page.

1. To add an image to an eSlide, in the eSlides Details section of a details page, go to the eSlide Images section and click **Add Image.**
2. Select **Reference an Image** or **Upload an Image**. (Your administrator may have configured eSlide Manager to not display the **Reference an image** selection.)

Most virtual slide images are too large to upload. If the file is too large to upload, eSlide Manager will time out before the image is loaded. You should use Reference an Image. When you reference an image, eSlide Manager points to and remembers the image location.

- Selecting **Reference an Image** allows you to browse to an image that is accessible to the server. Select the image file and click **Add** to reference this image. These images may be any size.
- Selecting **Upload an Image** allows you to browse to an image on your workstation that can be uploaded to the data table. Select the image file and click **Open** to upload the image. The size limit is 2GB.

Note on Third-Party Images

When adding an image to an eSlide, you can select the Reference an Image radio button to link to a Hamamatsu NanoZoomer or Zeiss Mirax image that is already on the server, but Zeiss Mirax image files cannot be uploaded from your workstation or local network.

Creating eSlides from Images in a Server Folder or SubFolder

1. Go to the eSlides data table and click **New.**
2. In the Add New eSlides page, select **Add eSlides with images in server folder and subfolders**.
3. Click **Browse** to select a folder that contains the eSlide image files.
4. Click **Add** to create eSlides for all of the images in that folder or **Cancel** to exit.

   If you select a folder that contains eSlide image files that have already been assigned to other eSlides, you now see a page that lets you know which images are already used.

   To use assigned images anyway (that is, to unassign them from other eSlides and assign them to your new eSlides), select the check boxes for the images you want to use and click **Reassign Checked Boxes.** Or, click **Cancel** to continue without reassigning the images.

6 Viewing Images

This chapter discusses how to view images in eSlide Manager.

At various locations in eSlide Manager where you can see data in list view, the View Images command is provided to open associated images in the ImageScope viewer.

The View Images Command

You can find the View Images command in areas of eSlide Manager where data is listed that is associated with images, such as:

- Specimens list view
- eSlides list view
- Case Specimens section of the Case Details page.
- Specimen eSlides section of the Specimen Details page.

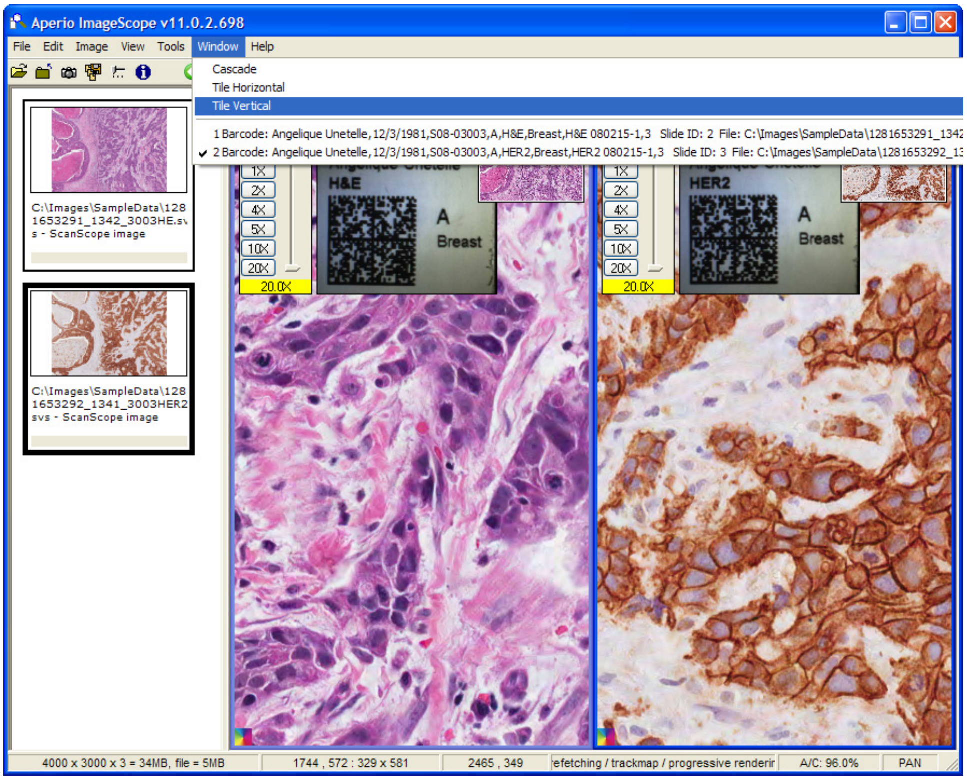
To view an image:

1. In list view, select an image by selecting the check box next to it and clicking **View Images** from the commands at the top of the data list to launch ImageScope to view the image.
2. Or, click the image thumbnail to display the image in ImageScope.

Tips on Viewing Images

See the ImageScope User's Guide for detailed instructions and ImageScope features and functions.

- If you select multiple images and then click **View Images** from the commands at the top of the data list, ImageScope will launch and display all of the images selected in the Filmstrip view in the ImageScope window.
- In list view, clicking on the icon to the left of the thumbnail will open the details page for that item and also launch ImageScope for that single image (no matter how many are selected in the list). (If you do not wish to automatically view the image, see *"Disabling Automatic Image Viewing" on page 41.*)
- After opening multiple images, you may then switch between the images or set the ImageScope **Window** choice to **Cascade**, **Tile Vertical** or **Tile Horizontal** to display all of the selected images at the same time.



- In ImageScope, going to the **View** menu and selecting **Filmstrip** will display all of the selected eSlides in a filmstrip to the left of the ImageScope image.

Keeping an Image Open

ImageScope normally closes any images already open if you go to an eSlide Manager page to select one or more new images to view. You can tell ImageScope to keep an image open by selecting the image in the ImageScope main window (if more than one images are open), going to the ImageScope **Image** menu, and selecting **Keep Open**. (Or, you can select the image and just type Control K.) The image will then stay open even if you go back to eSlide Manager to open other images.

To turn off Keep Open, select the image in the ImageScope window, and select the **Keep Open** command again or type Control K. To close an image for which Keep Open was selected, select the image, go to the ImageScope **File** menu and select **Close Image**.

Automatic Image Viewing

When you click on an image thumbnail or select an image and click **View Images** in eSlide Manager, ImageScope opens and displays the image.

When you click on the item's icon or select the item and click **Open Data**, you see the details page for that item and the image associated with that item opens in ImageScope.

This feature ensures that the proper eSlide Manager data entry screen is open for the correct corresponding image. In the case of eSlides, the operator must confirm that the eSlide labels match the eSlide data for further quality assurance.

If you want to disable automatically opening the image when using the Open Data command or clicking on the information icon, see the next section.

Disabling Automatic Image Viewing

To disable a data item's image from opening in a viewer when you open the details page for the item:

1. Go to the **Administrative** menu on the menu bar at the top of the eSlide Manager page and click **My Settings**.
2. On the User Details page, clear the **Enable Auto-View Images** check box.

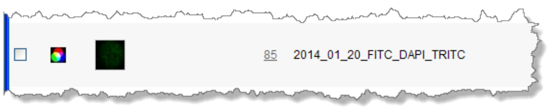
Clearing this check box prevents a viewer from opening and displaying the image when you open a details page for an item.

Viewing Fluorescence eSlides

The Aperio ePathology fluorescence scanning system begins with using the Aperio FL to create fluorescence eSlides by scanning glass slides stained with fluorochromes.

Fluorescence is the property of a *fluorochrome* (fluorescent dye or "fluor") to absorb light of one wavelength, become excited to a higher energy level, and emit light of a longer wavelength as it relaxes to a lower energy level. For details on scanning fluorescence slides, see the *Aperio FL User's Guide* and the *Aperio FL Console User's Guide*.

Once your fluorescence eSlide exists in eSlide Manager, you see a fused, false-color image. In this example, the last image listed for the eSlide is the AFI (Aperio Fused Image), a fused image of the channel images that make it up (in this case, a DAPI fluorochrome image, a TRITC fluorochrome image, and a FITC fluorochrome image). The AFI is indicated by the symbol.



Characteristics of a Fused Fluorescence Image

The Aperio Fused Image (AFI) is an innovative feature of the Aperio scanner fluorescence scanning system. Although you can view each false-colored channel image of a fluorescence scan separately (for example, the DAPI channel, the FITC channel, and so on), you can also view a fused image (the AFI) which shows you all of the false-colored channels fused into one image.

It is important to understand that the AFI file is a special type of image file—it is a composite file that points to the separate channel images. What this means is, because the AFI points to the individual channel images that it is created from, the AFI needs to know the location of the channel images. Moving or deleting a channel image breaks the connection between the channel image and the AFI, and the AFI image will be incorrect—that is, it may not display at all or will display without the deleted or moved channel image.

If this should happen, you can delete the broken AFI and create a new AFI in ImageScope by opening all the channel images (from their current locations) and using the ImageScope Fuse Images command. (To add the AFI to eSlide Manager, you must open the channel images in ImageScope from eSlide Manager—the fused image you create will then be added back into eSlide Manager. See the *ImageScope User's Guide* for details on using the Fuse Images command.)

Other characteristics of the AFI include:

- eSlide Manager does not allow you to add, move, or copy an AFI because doing so does not preserve the links between the AFI and channel images.
    - Although you cannot directly add or import an AFI into eSlide Manager, you can create an AFI from channel

images by using ImageScope. Also, scanning a fluorescence slide on the Aperio FL scanner automatically adds the AFI to eSlide Manager when the Digital Slide Repository (DSR) is defined to the scanner.

- You can delete an AFI, and doing so will not delete the channel images it was created from. However, note that deleting a channel image will "break" the AFI that points to it.

ImageScope Fluorescence Features

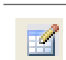
When you view the AFI in ImageScope, you can use the ImageScope fluorescence features to:

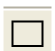
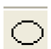
- Apply a temporary false color to a channel image
- Adjust color, brightness, contrast, and gamma of the AFI
- Show/hide individual channels in the AFI and show/hide channel color
- Cycle display of channels
- Correct registration of a channel in the AFI
- Create a new AFI from the individual channel images.

For details on using fluorescence images in ImageScope, refer to the *ImageScope User's Guide*.

ImageScope Toolbar Quick Reference

Please refer to the *ImageScope User's Guide* for a full explanation of ImageScope features. However, here is a quick reference to the more frequently used items on the ImageScope toolbar:

Icon	Action
	Go to the Open Image window where you can browse for a local eSlide to open for viewing.
	Close the eSlide that is currently being viewed in ImageScope.
	Create a snapshot image of the eSlide currently being viewed.
	Manually synchronize navigation for all eSlides currently being viewed. (Used when multiple eSlides are open in the ImageScope window.)
	(Yellow) Smart synchronization differs from manual synchronization; not only is navigation synchronized between the eSlides, but corresponding regions in the eSlide images are also synchronized. Useful when viewing multiple eSlides that were cut from the same tissue block.
	Show or hide the magnifier window.
	Show or hide the thumbnail window.
	Open the Annotations window where you can create multiple annotation layers and organize and add descriptions to annotations
	Pan the eSlide.

Icon	Action
	Zoom the selected area of the eSlide.
	Extract a region of an eSlide.
	Draw a free-form annotation.
	Draw a free-form annotation to be excluded from analysis. (This creates a negative annotation.)
	Measure an object on an eSlide.
	Draw a rectangular region (or a square if you hold down the Shift key while you draw).
	Draw an elliptical annotation (or a circle if you hold down the Shift key while you draw).
	Draw an arrow pointing to an area of interest.
	See help information for ImageScope.

7 Moving, Copying, and Cloning Data

This chapter discusses how to move, copy, and clone eSlide Manager data.

When copying or moving image files, you can browse to a folder on the server that is the destination of the image you want to copy or move.

Please see *"Chapter 5: Adding Data to eSlide Manager" on page 33* for information on adding an image either by uploading or referencing it.

Synchronizing Changes to the eSlide Manager Image Database

If you use the methods discussed in this chapter to move or copy image files, eSlide Manager will automatically update its database to reference the new locations. However, if you move image files outside of eSlide Manager, using standard Windows file operations, eSlide Manager will not know about the changes—if you do this, ask the eSlide Manager administrator to contact Leica Biosystems Imaging Technical Services for assistance in moving the files into eSlide Manager.

Moving or Copying an Image File

Moving an image file consists of moving it from its existing location as defined in eSlide Manager to a new location chosen by you and deleting it from its original location.

Copying an image file creates a copy of it in the specified destination, but does not delete the image file from its original location.

To move or copy an image file:

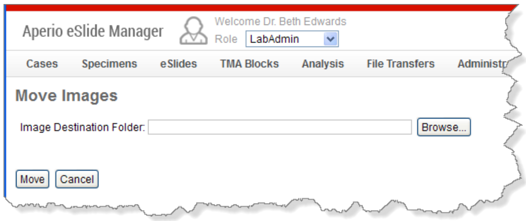
1. Log into eSlide Manager with a user role that permits moving and copying images. (If your user role does not permit these actions, ask an eSlide Manager administrator for help.)
2. Go to any eSlide Manager page that lists images (for example, the eSlides list or Specimens list) and select the check box next to one or more images to select them (or use the check box at the top of the list to select them all):
3. Click **Move** or **Copy** on the command bar.

Do not close the Move or Copy Status page or move to another page until you see the completion message. Image files can be quite large, so be patient and wait until the move or copy is done.

If you want to continue to use eSlide Manager while the move or copy is taking place, open another browser window and log in, if multiple logins are permitted on your location.

Moving an Image File

After selecting the Move command, you see the Move Images page:

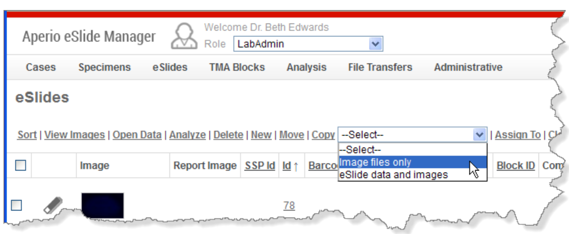


1. Click **Browse** to select the destination to which you want to move the file.
2. The initial folder displayed is the image root folder, which is read from the ImageServer.ini file. (This setting can be configured by using the Aperio ePathology System Information Utility.) If for some reason this setting cannot be found, the initial folder is C:\.
3. Navigate to the folder into which you want to move the image file.
4. To create a new folder, click the **Create Folder Here** link.
5. Once the correct folder is displayed in the folder text box, click **Move** to start the operation. The Move Status page displays and tells you when the operation is finished.

After the operation is complete, you can go to another eSlide Manager page or close the browser.

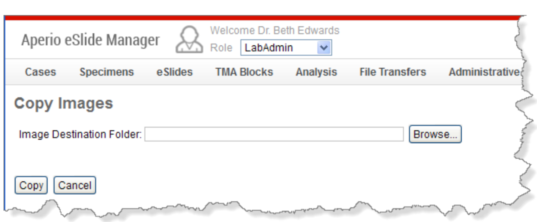
Copying an Image File

After selecting the Copy command you see a selection box:



1. From this drop-down list, select whether you will copy just the image itself or all the data that is associated with it (the eSlide).

   You see the Copy page:



2. Click **Browse** to select the destination to which you want to copy the file.
3. The initial folder displayed is the image root folder, which is read from the ImageServer.ini file. (This setting can

be configured by using the Aperio ePathology System Information Utility.) If for some reason this setting cannot be found, the initial folder is C:\.

4. To create a new folder, click the **Create Folder Here** link.

   Once the correct folder is displayed in the folder text box, click **Copy** to start the operation. The Copy Status page displays and tells you when the operation is finished.

After the operation is complete, you can go to another eSlide Manager page or close the browser.

Cloning Data

To understand how eSlide Manager structures data, it is first necessary to understand the concept of parent/child relationships.

Taking a case as an example:

1. The top-level data entity is the case.
2. A case generally contains one or more specimens. The specimens are child data to the case, which is the parent.
3. Specimens generally contain one or more eSlides. The eSlide is the child data to the specimen, which is the parent (and grandchild to the top-level entity, the case). The specimen in turn is child data to the case.

The Clone To command acts something like the Assign To command except that it makes a copy of the child data and assigns the copy to new or existing parent data.

This is a powerful feature because it allows you to share child data between data hierarchies. For example, the same eSlide can be assigned both to a case in the Clinical data hierarchy *and* a project in the Research hierarchy. Or, even within the same data hierarchy, you can share child data between different data groups.

The cloned child data is treated as a separate entity—for example, annotations made on an eSlide that is part of a project are not visible in the same image that is part of a case. (Some child data such as the actual image file itself, reports, and attachments, are not actually copied because they can be so large, but this is transparent to the eSlide Manager user.)

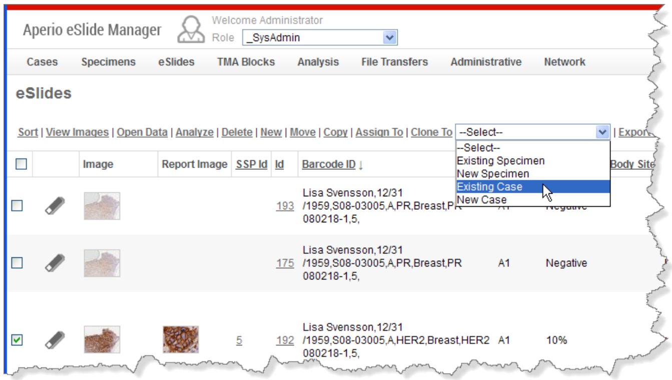
Using the Clone To Command

The Clone To command is available on all list pages that contain the Assign To command.

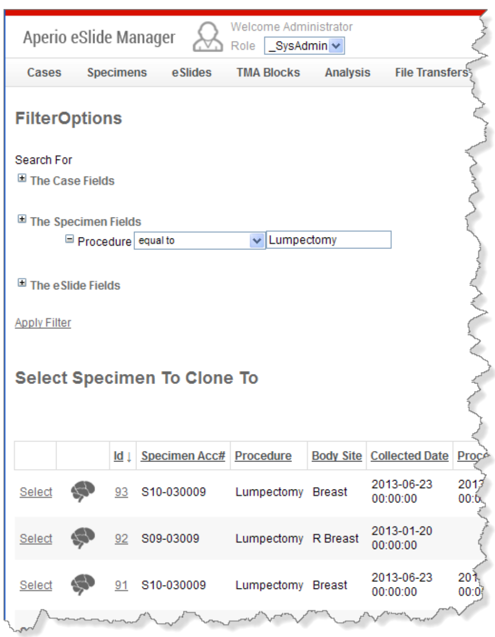
To use the Clone To command:

1. Select one or more items from the list page.
2. Click **Clone To**.
3. From the **Clone To** drop-down list, select what you want to clone the item or items to.

   For example, on the eSlides page, you can select whether to clone the eSlide to an existing specimen, new specimen, existing case, or new case. (If you are logged into another data hierarchy, you can select whether you want to clone the eSlide to a project or lesson.)



4. If cloning the eSlide to an existing parent such as a specimen or case, you see a Filter Options page on which you can narrow the choices by selecting a data field on which to filter the data. (See the illustration below.)
   a. Click the **+** next to a type of field to see the fields you can choose from (for example, Physician Name).
   b. Click a field in that list to select it and use the appropriate operator from the operator drop-down list.
   c. Type the characters you want to filter by in the right-hand text box.
   d. After entering your filter data, click **Apply Filter** to see a new list of choices.
   e. Click **Select** next to the item you want to clone the data to.



You see a message that the data has been cloned to the selected parent.

Preserving the Parent/Child Data Structure

Cloning tries to preserve the normal child data/parent data structure. For example, an eSlide would usually be child data to a specimen. If you clone the eSlide to a parent higher than the specimen (such as directly to a case), then:

- If the eSlide being cloned belongs to a direct parent, such as a specimen, then that specimen is also cloned to the higher parent.
- If the eSlide being cloned does not belong to a specimen, then a blank specimen is created and cloned to the higher parent.

8 Searching eSlide Manager Data

This chapter describes the features and functionality of searching within eSlide Manager.

Using the eSlide Manager search function, you can search the database on the majority of data fields defined within the data tables. Saved searches can assist you in refining your search in order to find or compare cases, specimens or eSlides of interest.

The search box is available at the top of every eSlide Manager page.

You can:

- Type text in the Search box for which you want to search
- Click the drop-down list to find saved searches

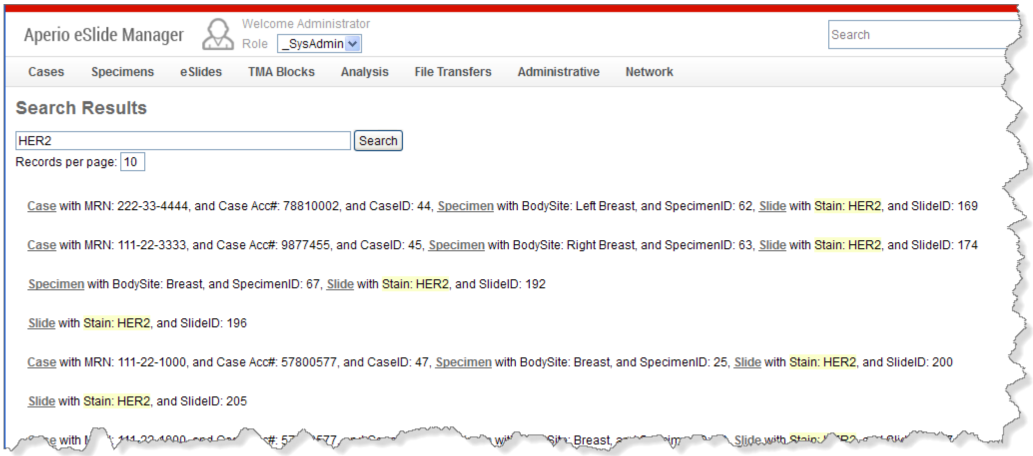
- or click to use the advanced search.

Introduction to Free-Text Search

The advantage of the free text search is that you can enter any text without specifying the eSlide Manager data area (for example, Case or Specimen) to search within. (The eSlide Manager administrator defines which fields are searchable.)

Here is a simple example of using the free-text search. We are looking for every occurrence of "HER2," so we type those characters in the Search box and click .

The search results are presented with supporting data that give you the context for the results. For example, if you search for "HER2," the search results tell you that this information is found in various cases and specimens. Links are provided so that you can go directly to the source of the found data.



Note that you can search within the search results by using the Search text box on the Search Results page.

Free-Text Search Tips

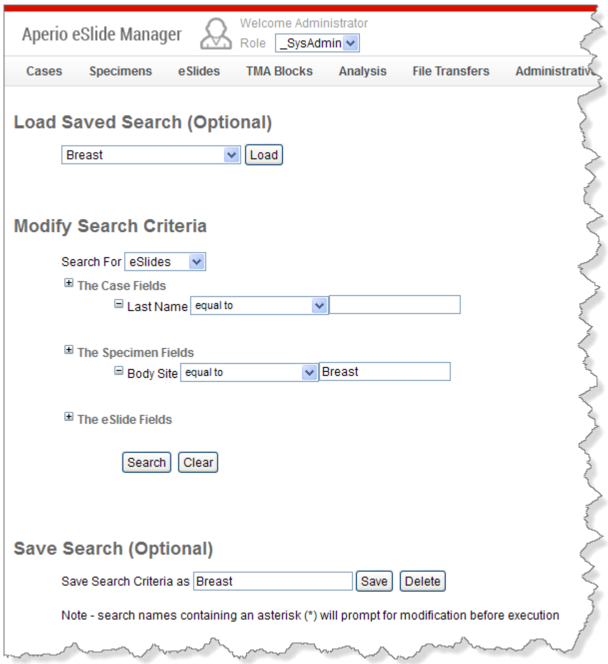
- The wildcard symbol * allows you to find words that partially match the search characters. For example, Gar* matches patient names Garcia and Garman.
- The results you see depend on the fields the eSlide Manager administrator has defined as available for search. Results also depend on the fields you have permission to see based on the data hierarchy you are logged into, the permissions assigned to the user role you are logged in with and any user groups you are a member of.

For additional information on saved searches, see the following sections.

Advanced Search and Saved Searches

To use the advanced search or to create a search:

1. Click  next to the Search box. The Search page appears:



2. Choose from the options on this page:

   a. Load Saved Search – If any searches have previously been saved, you can select one from this box. (This is the same list that appears in the main Search box at the top of the page when you click the drop-down list.)

   b. Modify Search Criteria – This is where you can create a search or modify an existing one. You can search saving the criteria you create now or can save the search for future use. To search without saving the search, just click Search.

   c. Save Search – To save the search criteria you have specified for future use, type a name in this box (for example, Breast Slides) and click Save.

Selecting Advanced Search Criteria

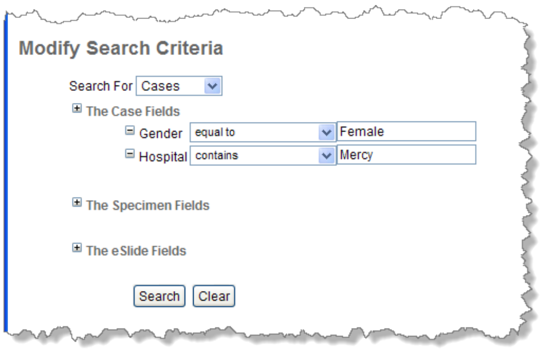
To create search criteria:

1. Select the type of information you are looking for (for example, Cases or Specimens) in the Search for box in the Modify Search Criteria section of the Search Options page.

2. Choose from the fields on which you want to search.

   Only fields that are displayed in the data table will be available for a search. For example, to search Case fields, click the + symbol next to The Case Fields and you see the list of case fields you can search for.

3. Select a field to search on by clicking it in the Fields box. The field appears (for example, Hospital), and you can select the type of search you want to perform by clicking the down-arrow in the box next to the field name and select a search operator (see *“Advanced Search Operators” on page 52*).
4. You can enter multiple search criteria. For example:



   - Click **Search** to start the search.
   - Click **Clear** to empty the search fields.
5. Click **Search** and eSlide Manager lists the cases that meet your search criteria.

Advanced Search Operators

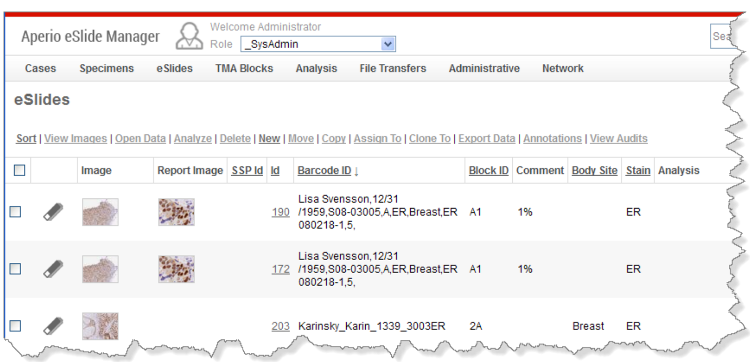
The following search operators are available when using the advanced search.

Search Operator	Description
All	Selects all data.
Equal to	Selects data for which the database field equals the exact data entered in the search field.
Not equal to	Selects data for which the database field does not equal the data entered in the search field. This could be useful for a status search, when status does not equal “complete.”
Less than	Selects data that is less than the data entered in the search field. Data is searched in alphabetic or numeric order, starting at the beginning of the text or numeric string. For example, in the patient name search you ask for less than Doe: • The search returns any patient name that begins with D, C, B, A and any names that begin with Do, Dn, Dm etc., Dod, Doc etc. For example, in a case number search, you ask for cases less than 30: • The search returns any cases numbers that begin with 2 or 1, including 29, 11, 100, 20000, 2324, 1120 etc.
Greater than	Selects data that is greater than the data entered in the search field. Data is searched in alphabetic or numeric order, starting at the beginning of the text or numeric string. For example, in the patient name search you ask for greater than Mary: • The search returns any patient name that begins with M, N, O, P, etc., Mb, Mc, etc., Maq, Map etc., Marx, Marw etc.

Search Operator	Description
Contains	• The contains operator allows you to search based on one or more characters that you enter. For example, type the letter E and the eSlide Manager database returns a list of physician names that contain that letter.
Between	The between operator allows you to search for all fields that match the two search entries and all data that lies between them alphabetically. • For example, entering Dr. A and Dr. F as the entries to search between returns the result of Dr. A, Dr. B, Dr. C, Dr. D, Dr. E, and Dr. F.
Includes	The includes operator allows you to search for all items that satisfy any of a list of search parameters. • For example, suppose you are searching for all cases that have the status of either Pending or Report Sent. Select the **Status** field under the Case Fields section, specify the includes operator, and, in the search box, type the search parameters separated by a comma (for example: Pending, Report Sent). The search returns all cases with the status of Pending and Report Sent.

Advanced Search Results

Unlike the free-text search results discussed earlier, advanced search results appear on the appropriate list page with just the matching items displayed. For example, if in advanced search we look for all eSlides that are stained with the ER stain, we see a filtered list of eSlides that use that stain.



If you want to slightly modify the results of the search, click at the top of the page to go back to the Search page where all of your search choices are still there and you can make changes and search again.

Advanced Search Tips

If you want to..	Do this
Save a search	After selecting the search criteria, to save the search go to the Save Search section and type a name for the saved search in the **Save Search Criteria** box. Then click **Save**.
Delete a saved search	To delete a saved search, select it in the Search box. On the Search Options page, verify the name in the **Save Search Criteria** box in the Save Search section, and click **Delete**.

If you want to..	Do this
Modify a saved search	To modify a saved search, select it from the Search box drop-down list. On the Search Options page, change the search criteria and click **Save**. To save it under another name, type a new name in the **Save Search Criteria** box and click **Save**.
Create a search with a placeholder	In some cases you want to perform the same type of search multiple times but each time you want to specify a different item (such as a patient name). If you include a * in the saved search name, when you select that search, you will go to the Search Options page where you can enter the specific item you are looking for. For example, we created and saved a *HER2 Slides by Patient** search. This search looks for all HER2-stained eSlides that belong to a specific patient. We created the search with a placeholder patient name, Jane Doe. When we use this saved search, we are directed to the Search Options page where we enter the name of the patient we want to search for in place of the Jane Doe name, and click **Search**.

Saved Searches Ownership

Saved searches are associated with the user who created them for each data hierarchy. (For example, an operator who logs into the Clinical data hierarchy may have different saved searches than the same operator logged into the Research hierarchy.)

9 Analyzing Images

This chapter describes the terminology, features and functions available to analyze images in eSlide Manager.

Adding image analysis macros is done by the Administrator. See the ImageScope User's Guide and Aperio ePathology Image Analysis User's Guide for details.

Aperio ePathology Algorithms

Analyzing eSlides helps you to examine slide staining to find patterns that will tell you more about the eSlide. Using an algorithm to look for these patterns provides precise, quantitative data that is accurate and repeatable. The process of analyzing an eSlide is done by applying algorithms directly to the eSlide or selected regions of the eSlide.

The Positive Pixel Count algorithm is licensed without charge with other Aperio ePathology software. Other algorithms are available from Leica Biosystems Imaging for a license fee. Algorithms have also been developed by third parties and tools are available from Leica Biosystems Imaging for creating your own algorithms—contact Leica Biosystems Imaging for details.

These algorithms all have control parameters—for example, intensity and hue settings—that allow the algorithm to be tailored to your specific needs.

Analyzing eSlides in eSlide Manager

eSlide Manager provides a convenient tool for batch analysis of eSlides. Before you can batch analyze selected eSlide images in eSlide Manager, an eSlide Manager administrator must first create a macro for each image analysis algorithm you want to use for analysis. You can then select one or more eSlides from the eSlide list to batch analyze with a specified macro.

You can display the status of all eSlides that have been submitted for analysis (see *"Viewing the Analysis Job Queue" on page 59*). As eSlide analyses are complete, they disappear from the queue. Or you can cancel analyses.

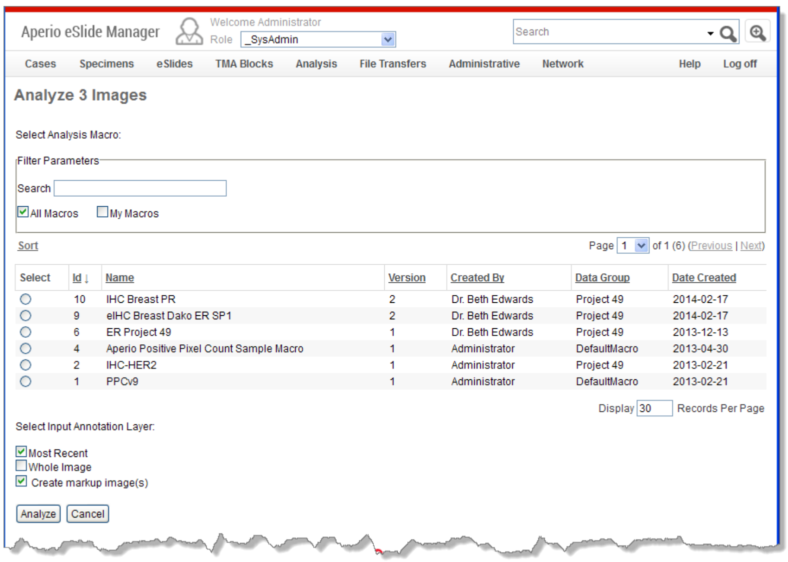
eSlide Manager Analysis Batch Jobs

eSlide Manager provides a convenient tool for batch analysis of eSlides. Before you can batch analyze selected eSlide images in eSlide Manager, the eSlide Manager administrator must first create a macro for each image analysis algorithm you want to use for analysis.

Analysis can be taking place while you continue to work within eSlide Manager, organizing data and annotating images.

1. Display the desired list of eSlides.
   - Open a specific case or project to see the eSlides associated with that case/project.
   - You may list all eSlides by clicking the eSlide icon on the main eSlide Manager page or by going to the eSlides menu and selecting **All eSlides (As List)**.
   - Or, you may want to search within the eSlides for a specific stain or status. (See *"Chapter 8: Searching eSlide Manager Data" on page 49* for more information.)
2. Select the box to the left of each eSlide to be batch analyzed.
3. Click **Analyze** from the commands at the top of the data list.

   The Analysis page displays:



The list of annotation layers you see in the Select Input Annotation Layer section of the Analysis page depends on the eSlides you have selected to batch analyze.

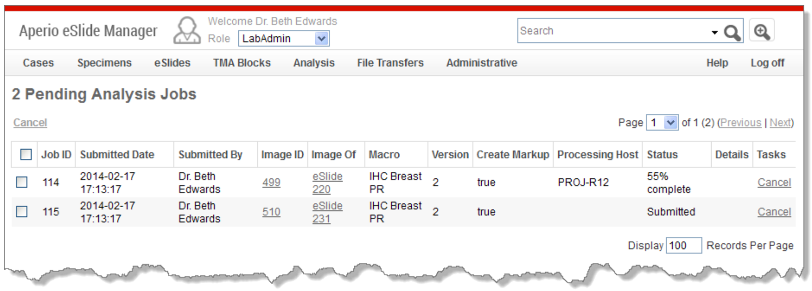
The number of annotation layers that all the selected slides have in common are listed in this section. This is because eSlide Manager does not allow you to select an annotation layer that does not exist for all the selected eSlides. (In this example, all slides have three or more annotation layers.)

If one of the eSlides selected has zero annotation layers, you will only see Most Recent or Whole Image as selections.

4. Select the macro of your choice. See the section below for information on finding a particular macro.
5. If you want to analyze only a portion of the image, select a specific annotation layer in the Select Input Annotation Layer section or click **Most Recent** to select the annotations in the most recently created annotation layer. If you want to analyze the entire eSlide, select **Whole Image**.

(See the *ImageScope User's Guide* for information on drawing annotations to select areas to analyze.)

6. Select the **Create markup image(s)** check box if you want to see the results of the analysis is a visual way on the image.
7. Click **Analyze**. The eSlides chosen for analysis will be added to the Analysis Job Queue. (The queue displays now; to see the queue at another time, go to the **Analysis** menu and select **Jobs**.)



Batch Analysis on eSlide Manager with Third-party Tools

When you use the batch analysis feature on eSlide Manager by selecting one or more eSlides on a list page and then click Analyze, you go to the eSlide Manager Analysis page where you select which algorithm macro to use.

If a third-party analysis tool (for example, Definiens TissueStudio) is installed on eSlide Manager, you see an additional drop-down list at the top of the page from which you can select either eSlide Manager Macros or the third-party tool. In this case, if you want to use an eSlide Manager macro, choose **eSlide Manager Macros** from the **Select Analysis Macro** drop-down list and then select a macro in the macro list below.

Organizing and Finding Algorithm Macros

There are a number of ways to filter the list of macros so you can find the one you want to use:

The first step in searching for specific algorithm macros is to select the **All Macros** check box to see all of the macros available or to select the **My Macros** check box to see all of the macros created by you.

The next step is to start typing part of a macro name in the Search box; the eSlide Manager immediately displays the list of macros that contain those characters in their name.

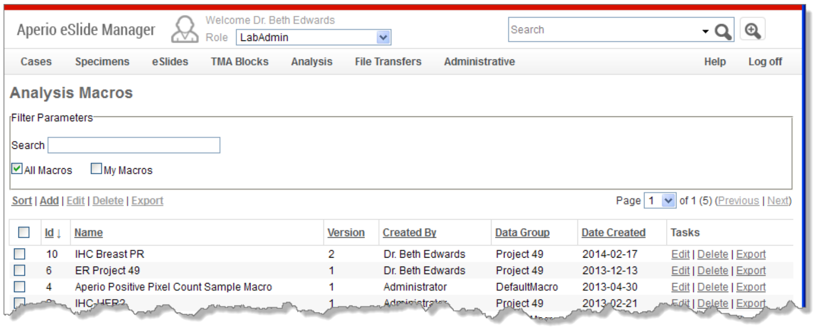
Sorting Macros

You can click on any underlined column title on the Analysis Macros page to sort the list of macros based on the contents of that column. Click once to sort in ascending alphabetical order; click again to sort in descending order.

For a more detailed sort, click the **Sort** command at the top of the macro list. For information on using this type of sort, see *"Multi-Level Sort on a List Page" on page 27*.

Macro Versions

When you save a macro from ImageScope, if you are overwriting a macro that already exists, eSlide Manager will increment that macro's version number on the Analysis Macro page so that you can see that the macro changed.



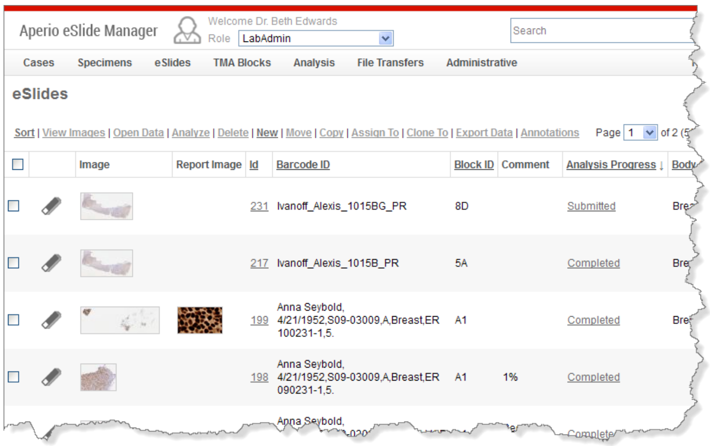
Note that you can only revise a macro if you have Full Control of the data group it is assigned to.

Working with Algorithm Macros

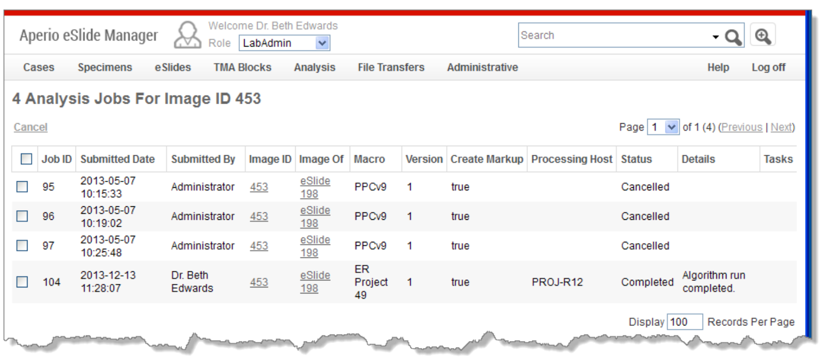
If you want to...	Do this
Export macros from eSlide Manager	To export a macro from eSlide Manager (for example to import the macro to another eSlide Manager location), click **Export** on the line for that macro on the Analysis Macros page or select the check boxes for multiple macros and click the **Export** command at the top of the macro list.
Delete macros from eSlide Manager	To delete a macro from eSlide Manager, click **Delete** on the line on the Analysis Macros page for that macro or select the check boxes for multiple macros and click the **Delete** command at the top of the macro list.
Add macros to eSlide Manager	If you want to add a macro to eSlide Manager that has been exported from another eSlide Manager location or that has been saved from ImageScope, click **Add** at the top of the macro list. (Note that saving a macro in ImageScope when you have opened an eSlide from the eSlide Manager automatically saves the macro on eSlide Manager.) You are asked to navigate to the location of the macro file on your workstation and will be asked to select a data group to add that macro to.

Viewing eSlide Analysis History

On any eSlide Manager page that contains a list of eSlides (for example, the main eSlide list page or a Specimen Details page), the Analysis Progress column lists status information on the analysis of that eSlide.



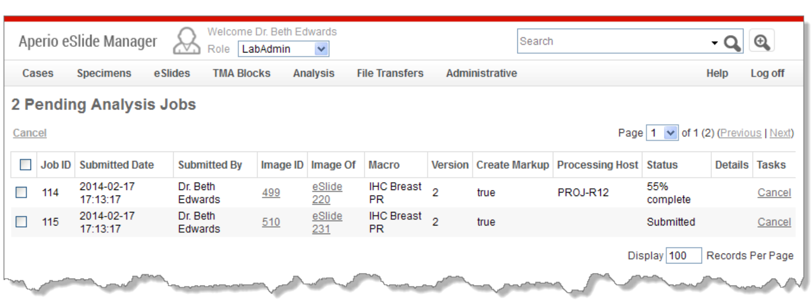
Click on the status (for example, "Completed") to go to a page that gives information on all analyses of that eSlide:



Viewing the Analysis Job Queue

To check the status of current analyses, go to the **Analysis** menu and select, **Jobs**.

The Analysis Job Queue page displays the status of the image analysis. The status reads *Submitted* or *In Progress*. For longer jobs, you may see percentage complete displayed.

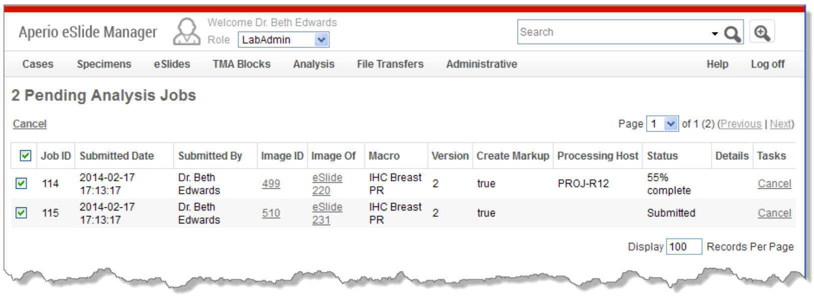


As eSlides complete analysis, they disappear from the job queue.

Canceling Analysis Jobs

If you want to cancel one or more analysis jobs:

- To cancel a single job, click **Cancel** on the line for that job.
- To cancel multiple jobs, select the check box next to each job and then click **Cancel** at the top of the list.
- To cancel all jobs, click the check box at the top of the list to select all jobs, then click **Cancel** at the top of the list.



Definiens Tissue Studio Image Analysis for Brightfield and Fluorescent eSlides

Leica Biosystems Imaging has partnered with Definiens who develop and market Tissue Studio, which provides an integrated solution for the analysis of digital brightfield and fluorescent images.

The partnership integrates the Aperio ePathology eSlide Manager digital pathology system with the Definiens Tissue Studio product. Tissue Studio contains tools for automated pattern recognition, quantitative image analysis, and data analysis.

Installing Definiens Tissue Studio

Each person who wishes to use Definiens Tissue Studio must run the installers on his or her workstation (this product is client-based, and is not installed on the eSlide Manager server).

Contact Definiens to obtain the Tissue Studio version 3.0 or later installer files. Each workstation on which Definiens Tissue Studio is installed must also have a valid license.

Using Definiens Tissue Studio within eSlide Manager

To use the Definiens Tissue Studio product within eSlide Manager:

1. Within eSlide Manager, select an image and click **Analyze**.
2. On the Analysis page, select **Definiens TissueStudio Analysis** from the drop-down list.

   As with selecting any algorithm, select whether you want to create a mark-up image and select the annotation layers you want to analyze.
3. Click **Analyze** to begin the analysis.

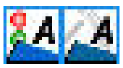
For More Information

For information on using the Definiens Tissue Studio product and interpreting its results, see the user documentation that accompanied the product.

A Creating a Workspace (Dashboard)

This appendix describes the features and functions of the Aperio ePathology Dashboard

After the eSlide Manager client software is installed on your computer, you see two icons at the bottom right of your desktop in the system tray:

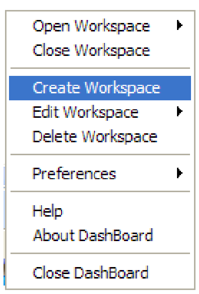


These icons are for the Aperio ePathology Service Manager and the Aperio ePathology Dashboard.

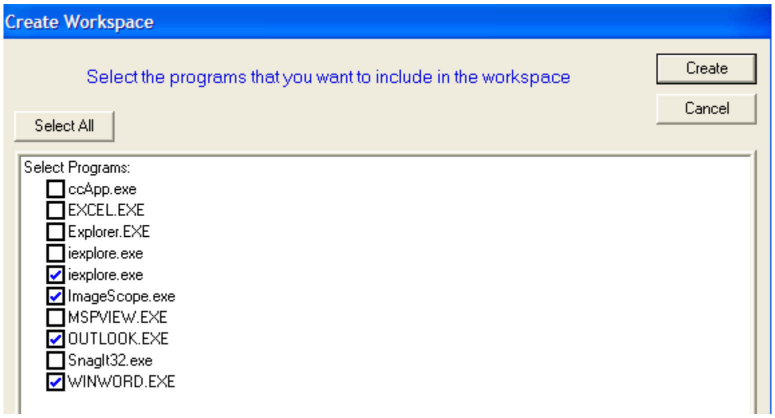
The Dashboard allows you to set up the windows on your desktop and save the settings for each user configuration. For example, you may want to open a browser for eSlide Manager, your Outlook calendar, Word and ImageScope in a particular desktop arrangement and save it as Joe’s Desktop.

Creating a Workspace

1. Open all of the applications that you want to be displayed in your dashboard view. Size the windows accordingly.
2. Click on the Dashboard icon  to open the **Dashboard**.
3. Click **Create Workspace**.

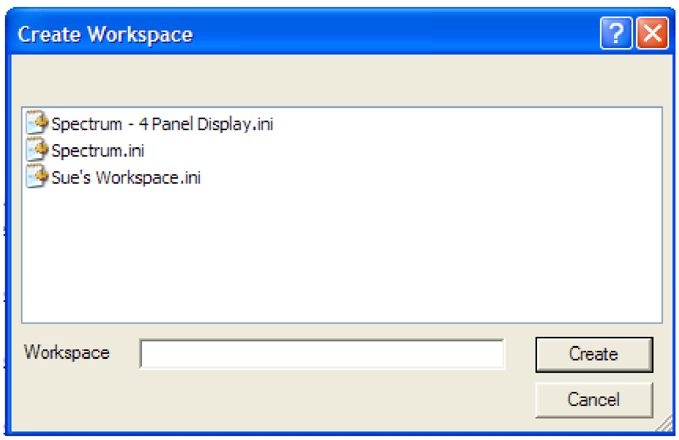


4. Select the desired applications to be saved in your workspace.

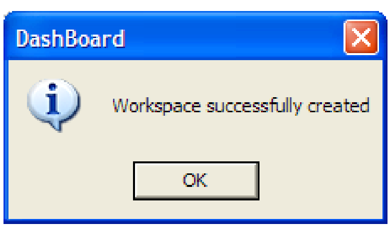


5. Click **Create** to save or **Cancel** to exit.

6. Enter the name of the workspace and click **Create.**

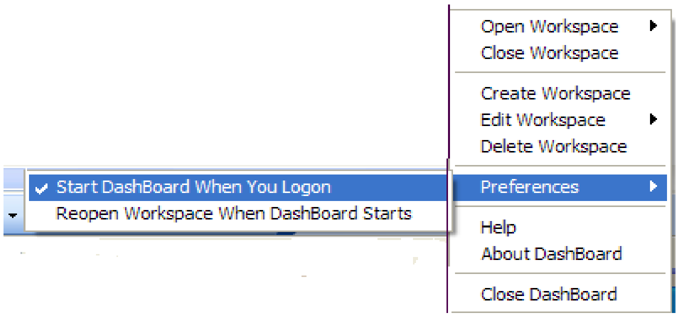


7. Click **OK**.



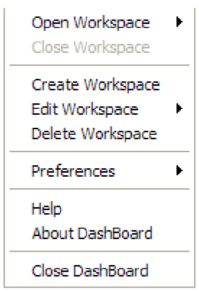
8. Click on the Dashboard icon  to open the **Dashboard**.

9. Select **Preferences** to select your workspace preferences.



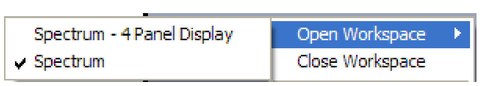
Opening an Existing Workspace

1. Click on  to open the **Dashboard**.
2. Select **Open Workspace**.



3. Select the workspace.

The default workspaces are **eSlide Manager** and **eSlide Manager - 4 Panel Display.**



- Choose **eSlide Manager** if you have a single monitor. This workspace automatically opens an Internet browser on the left and ImageScope on the right.
- Choose **eSlide Manager - 4 Panel Display** if you have a multiple monitor setup. This workspace opens and Internet browser, ImageScope, Microsoft Outlook, and Microsoft Word.

Other Dashboard Features

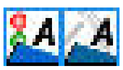
Other features in the Dashboard menu are:

- **Close Workspace -** Closes all workspace windows
- **Edit Workspace -** Select this menu item to add or remove programs in an existing worklist. Before editing a workspace, make sure all of the new windows that you want to add to the workspace are open. When the Edit Workspace menu item is selected, a window is displayed that lists the program names for all the windows currently in the worklist, followed by the program names for all that are not in the worklist. Select the check box next to each of the programs that you want to include in the workspace. Uncheck the check box for programs that you want to remove from the workspace. Click **OK** to save the edited workspace.
- **Delete Workspace -** Select this menu item to delete one or more of your workspaces. When selected, a window is displayed that lists the names of all your workspaces. Select the check box next to each workspace that you want to delete and then click **OK**. If you delete the currently open workspace, the workspace windows are not automatically closed.
- **Help**
- **About Dashboard -** Displays the version
- **Close Dashboard**
    - Select this menu item to close the DashBoard program. If a workspace is open, it is not automatically closed when Dashboard exits.
    - Selecting **Close Dashboard** will remove the icon from your desktop, unless you have set the default preference **Start Dashboard When You login.**
    - If this is not your preference, you can display the Dashboard icon again by selecting **Start> Programs> ScanScope> Dashboard.**

B Managing Aperio ePathology Services

The Aperio ePathology Service Manager allows you to stop or restart various Aperio ePathology services. You may be asked to access this tool by Leica Biosystems Imaging Technical Services if you have a problem with opening or accessing images or data.

After the eSlide Manager client software is installed on your computer, you see two icons at the bottom right of your desktop in the system tray:

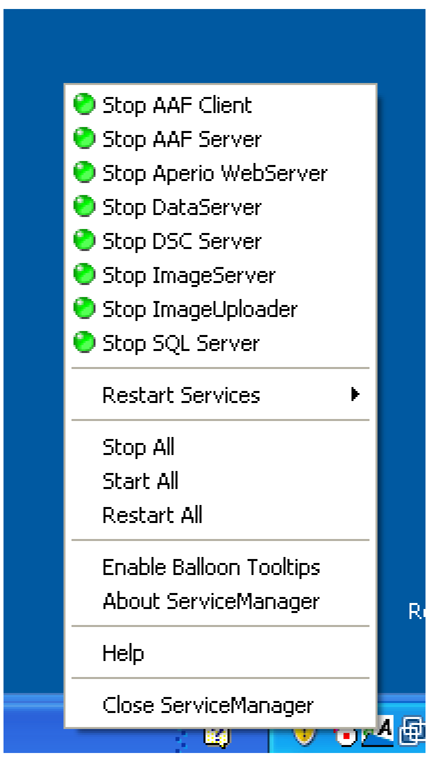


.

These icons are for the Service Manager and the Desktop Manager.

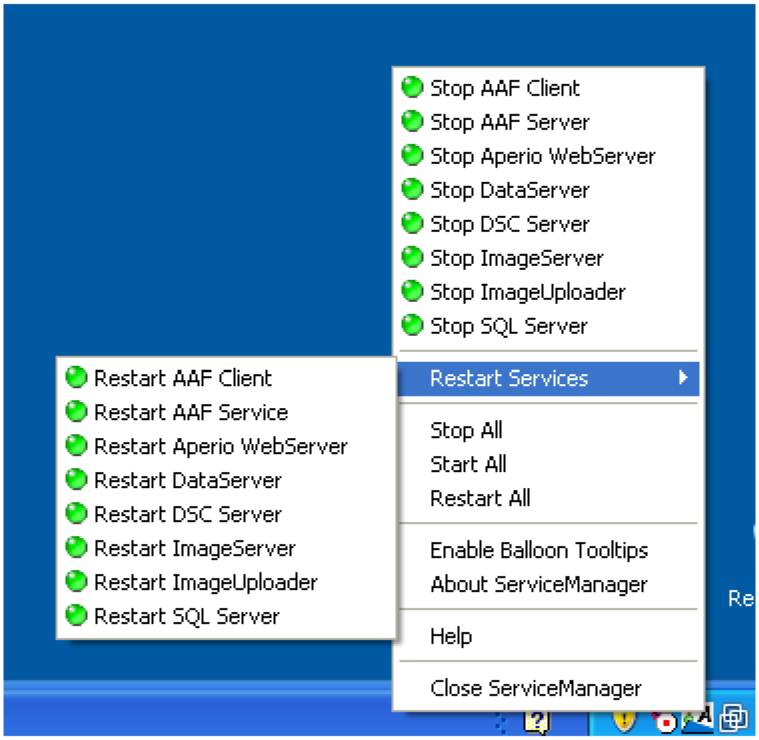
Accessing the Service Manager

1. Click the  icon to open the Service Manager tool:



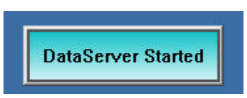
A green light on this menu indicates that the service is currently running, while a red light indicates the service has stopped.

2. To start a stopped service, click the stopped service on this menu.
3. To stop a running service, click the service on this menu.
4. To restart a service, select **Restart Services** on this menu and then select the service you want to restart.



If you select Stop All, Start All, or Restart All, we recommend that you restart your workstation.

As a service starts or stops, you see a status message. For example:



C eSlide Sharing

The Aperio ePathology sharing network, eSlideShare.com, makes it easy to share your cases, projects, and courses with others.

eSlideShare is an informal eSlide sharing service provided as part of your eSlide Manager support contract. For information on a more extensive quality assurance case review service, ePathAccess, which is available as an option to the Aperio ePathology Healthcare Applications, please contact your Leica Biosystems Imaging sales representative

eSlideShare.com resides on a server that is maintained by Leica Biosystems Imaging and it contains a specially configured version of eSlide Manager.

eSlideShare can be used to share cases, projects, and courses with or without eSlides for a variety of applications, including case review, decision support, publication support, and education. By eliminating the logistics required to physically ship glass slides, eSlideShare improves turnaround time to provide pathology services to remote hospitals and colleagues around the world.

The data you share on eSlideShare has basically the same structure as the data on your eSlide Manager location, which means you and the people you share the data with navigate it in the same way you would on your local eSlide Manager location.

You can share a case, project, or course with a single person or with a group of people. An email message is typically sent to the person or persons with whom you are sharing information informing them that a case, project, or course was shared with them. They can log into eSlideShare.com to view and potentially update the case, project, or course.

eSlideShare's key benefits include:

- Make eSlide files and related information, such as case details, available to participating members.
- eSlides and associated information are transported to eSlideShare exclusively through outbound connections from participating locations, overcoming the major technical hurdle of institutional firewalls.
- eSlides and associated information are stored at a Tier 1, state-of-the-art data center that protects sensitive data through its high availability, high security, and top-notch reliability.

Compatibility

The following notes discuss eSlideShare prerequisites and compatibility.

- eSlideShare is compatible with eSlide Manager 12.0/Spectrum Release 10.0 Update #3 and later.
- eSlideShare sharing is enabled by default on all compatible eSlide Manager locations using eSlide Manager 12.0/

Spectrum Release 10.0 Update #3 and later—the eSlide Manager administrator can edit the command permissions for specific user roles to disable sharing for those roles.

- You cannot share multi-file images, such as Composite WebSlides or Zeiss Mirax eSlides. However, you can use Digital Slide Studio to convert those images to a compatible file type, such as .SVS, which can be shared.
- eSlide Manager user-defined fields are not transferred to eSlideShare, nor are TMA data, reports, annotations and mark-up changes.
- If a user role on the local eSlide Manager location is configured so the user who logs in with that user role cannot see certain data table fields, that user does not see the data in those fields, and also does not even see the fields on their local eSlide Manager location. If this user shares a case/project/course on eSlideShare, the data for those hidden fields will not be uploaded to eSlideShare, but the labels for those fields *will* display on eSlideShare.

How Do I Share a Case, Project, or Course?

Within eSlide Manager, organize your eSlides into cases (or projects if you are logged in as a researcher or courses if you are logged in as an educator). You will be sharing the case/project/course, which contains all the information about the eSlides in addition to the eSlides themselves. (If you are not familiar with eSlide Manager data hierarchies or the basic operation of eSlide Manager, refer to the first few chapters of this guide for assistance.)

After you share a case, project, or course, it is available on the eSlideShare website to both you and the recipient or group of recipients with whom you shared it. You and your recipients can log into eSlideShare to view and potentially modify the data shared there.

The following sections discuss how to share a case, project, or course on eSlideShare in detail, but here is a quick summary:

1. Log into your local eSlide Manager location and on the Case, Project, or Course Details page of the item you want to share, click the **eSlideShare** button.

   You will be taken to the eSlideShare website to log in.
2. Log into eSlideShare (or sign up as a new user if you don't have an eSlideShare login).
3. Define who you want to share the case, project, or course with.
4. Share the case, project or course.
5. Optionally review the case/project/course on eSlideShare to check for responses or changes.

Step #1 – Initiate the Share

1. Log into your local eSlide Manager location. If you have a choice of user roles, select the user role that is associated with the type of data hierarchy you want to share (case/project/course).
2. On the main eSlide Manager page, click the case, project, or course icon. If your eSlide Manager start page has been set, instead of the main eSlide Manager page you may go directly to your list of cases/projects/courses. See *"Login and Preferences Tips" on page 13* for information on setting your start page.
3. Open the item you want to share.
4. Make any changes you want to the case/project/course and click **Save**.
5. While still on the Details page, click the **eSlideShare** button.

6. You are now redirected to the eSlideShare website (http://eSlideShare.com), where you will be asked to log in.

Step #2 – Log into eSlideShare

During the process of sharing data, you are asked to log into the eSlideShare website. (If eSlideShare remembers you from a previous session, you won't be asked to log in, but will go directly to the Share on eSlideShare page. In this case, see *"Step #3 – Set Up Recipients" on page 71*.)

The first time you log into eSlideShare.com, you are asked to accept the eSlideShare terms and conditions.

On the eSlideShare Login Required page, type your user name and password.

- If you have not signed up for eSlideShare in the past, click **Sign up**. See *"New Member Signup"* below for details on signing up.
- If you are already signed up for eSlideShare, log in. The user name is the email address you used when you previously signed up on eSlideShare. Click **User Login**.

  Now you are ready to share. See *"Step #3 – Set Up Recipients" on page 71*.
- If you previously signed up for eSlideShare but don't remember your password, click **Reset** to reset your password.

  On the Reset Password page, enter the email address you signed up on eSlideShare with and click **Reset Password**.

  A temporary password will be emailed to you that you can use to log in. Leave your browser open so that you can return to eSlideShare to log in.

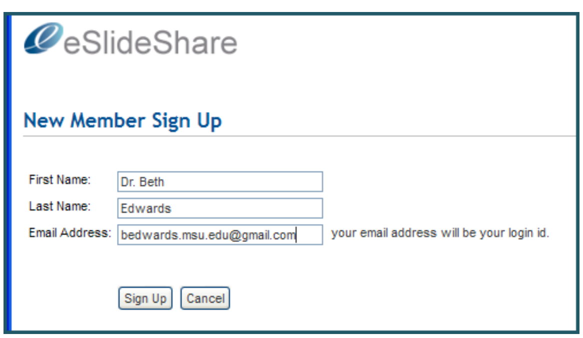
  Log into eSlideShare using the temporary password. You will be asked to change your password. Now see *"Step #3 – Set Up Recipients" on page 71*.

New Member Signup

If while sharing a case, project, or course you go to the eSlideShare login page but have not yet joined eSlideShare:

1. Click **Sign up** on the eSlideShare login page.

   You see the New Member Sign Up page.



2. Fill in your name and your email address. Under some circumstances, you may be asked to choose the data hierarchy you are going to share data from:

3. Click **Sign Up**.

   You see a message that your login information has been emailed to you. Leave your browser window open so that you can return here to log in.

4. Check your email. You should have a message titled “eSlideShare Invitation” that contains your user name and a temporary password.

5. Enter your user name (the email address you used to sign up on eSlideShare) and password on the eSlideShare login page and click **User Login**.

6. You are now asked to change your password.

7. Type a new password, retype it, and click **Save**. (If there are special requirements for your password, hint text displays next to the password box.)

Step #3 – Set Up Recipients

After you have logged into eSlideShare, you will have the opportunity to specify who you want to share your information with.

You can share with one person or groups of people. You are given the opportunity to define, edit, and select recipient groups during the share process.

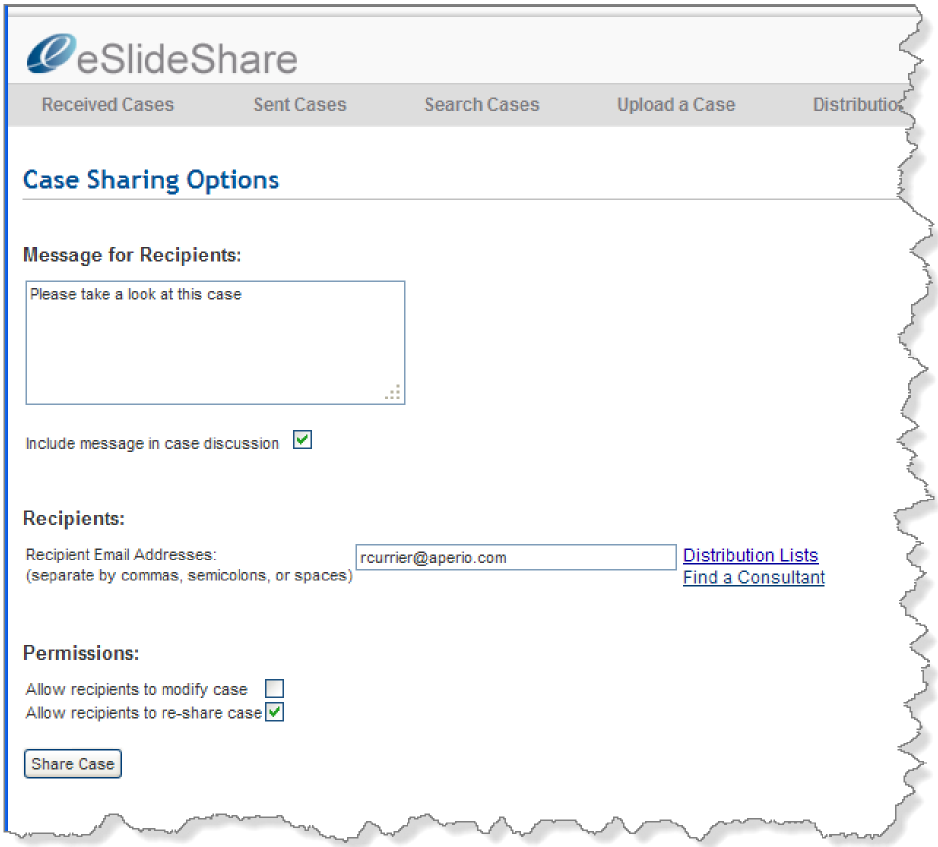
There are two ways to define a recipient:

- Quick Add
- Create Distribution Lists – A list can contain a single recipient or a group of recipients.

See the sections below for details.

Recipient Quick Add

You now see the Sharing Options page (this example is for sharing cases):



To quickly define a recipient with default settings:

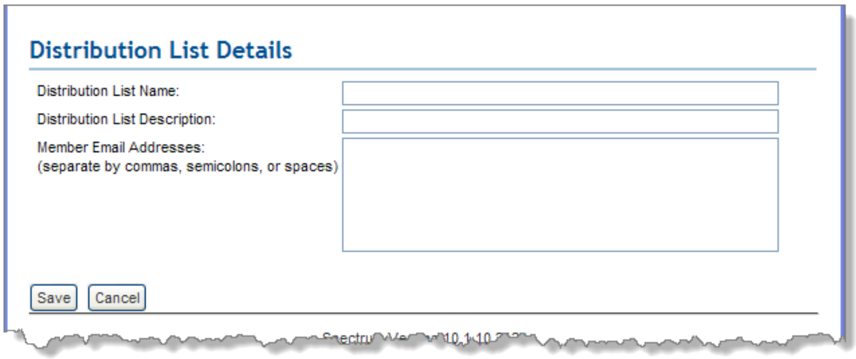
1. Optionally type a message for the people with whom you are sharing the case/project/course in the **Message for Recipients** box and select the **Include message in discussion** check box.
2. Enter one or more email addresses in the **Recipient Email Addresses** box. (If you enter multiple email addresses, separate them with a comma, semicolon, or space.)
3. Specify the rights you want the recipient or recipients to have regarding this case/project/course:
   a. **Allow recipients to modify case/project/course** – If you do not select this check box, the recipients won't be able to make any changes, such as adding comments.
   b. **Allow recipients to re-share case/project/course** – If you do not select this check box, the recipients won't be able to share the case/project/course with anyone else.
4. Click the **Share** button.

Now see *"Step #4 – Share" on page 73* for information on the rest of the share process.

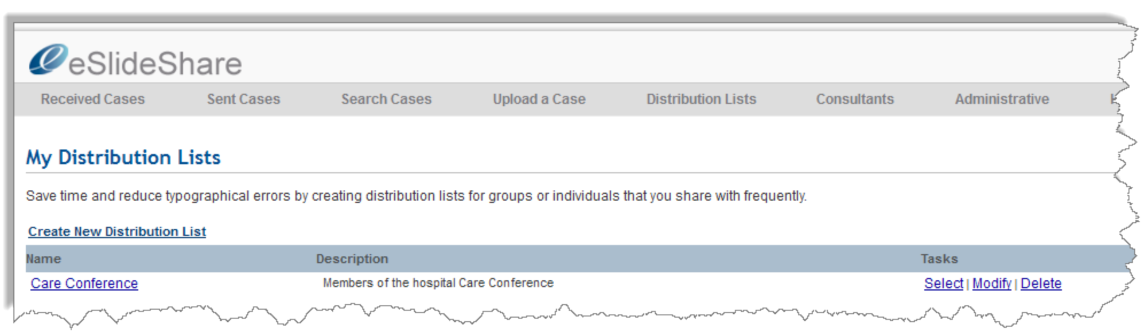
Create Distribution Lists

To create a distribution list:

1. On the Share Options page, click Distribution Lists to create a group of recipients to share with. You see the My Distribution Lists page.
2. Click **Create New Distribution List**. You see the Distribution List Details page:



3. Enter the name of the group in the **Distribution List Name** box and, optionally, a description of the group in the **Distribution List Description** box.
4. Type the email addresses of the people you want to add to the group, separating them with a comma, semicolon, or space.
5. Click **Save**. The new distribution list now displays on the My Distribution Lists page:



- To share the case, project, or course with a distribution list, click **Select** on the same line as that list's name. (See *"Step #4 – Share" on page 73* for information on the rest of the share process.)
- To modify members of a distribution list, click **Modify** for that list.
- To delete a list, click **Delete** for that list.

Step #4 – Share

After you click Share next to the person or group you want to share a case, project, or course with on the Share on eSlideShare page, the new page shows the data being copied to that person or group:

Sharing with DataGroup ID 14. Copying data may take some time to complete.
Do not close this window until copy has finished

Copying Case Id: 52...
Copying Document. Please wait... done
Copying Specimen Id: 460...
Updating share history... done

Your case has been copied and its images have been queued for transfer. Click here to view the transfer queue.

Note that when you see this page, you are on your local eSlide Manager location, not on eSlideShare. Be careful not to close this window until you see "Your case/project/course has been copied…"

Although the eSlideShare website looks very much like your local eSlide Manager site, you can always tell where you are by looking at the logo at the top of the page. If the logo says "eSlide Manager," you are on your local eSlide Manager site; if the logo says "eSlideShare," you are on the eSlideShare website.

To see the queue of all files being transferred in the background from your local eSlide Manager site to eSlideShare, click the **Click here** link on the page shown above.

You can see where your files are in the queue by looking at the Requested By column—your eSlide Manager user name indicates which files belong to the data you shared.

About Uploading Image Files

Most of the case/project/course information gets copied to eSlideShare right away. However, the eSlide image files are typically large and upload in the background, which means it can take a while for the image files to be available to view on eSlideShare—the recipients won't get the email message telling them the shared data is ready to view until all files are uploaded.

If you or the person with whom you are sharing the data log into eSlideShare to view the data before the image files have uploaded and open the case/project/course containing eSlides, you see progress indicators instead of the actual thumbnail, label, or macro images.

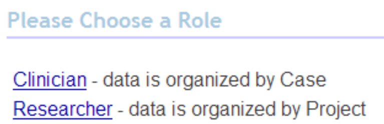
At any time you can check the status of files being uploaded to eSlideShare by going to the eSlideShare menu on your local eSlide Manager location and selecting File Transfer or by viewing the progress indicators for the images on eSlideShare.

Step #5 – Review the Case/Project/Course (Optional)

After sharing a case, project, or course, you can review it on eSlideShare to see what changes, comments, or recommendations have been made by the people with whom you shared the information. (To facilitate reviews, two special fields are available for cases that can be used by recipients—Recipient Comments and Recipient Recommendations.)

At any time you can review your shared data by going directly to the eSlideShare website. You will find using the eSlideShare website very similar to using eSlide Manager.

1. Use your browser to go to www.eSlideShare.com.
2. On the main page of eSlideShare, log in. Your user name is the email address you used to sign up for eSlideShare, and your password is the password you defined when you signed up.
3. If you have previously shared more than one type of data (clinical, research, and education), you are asked to choose which type of data you want to view.



4. Use the appropriate **List All** command on the eSlideShare main page to see the list of cases/projects/courses.
5. Click the icon next to the case/project/course you want to review to open it.
6. If you are reviewing a case, move down the Details page to see the area where recipients may have entered comments or recommendations:

eSlideShare Preferences

As an eSlideShare user, you can modify information about yourself. (Note that changing your email address does not change your eSlideShare user name or the email address used to send you notifications.) You can also change your password.

While logged in on eSlideShare, go to the **Administrative** menu and select **My Settings** to set user preferences.

Some of the options on this page include:

- **Enable Auto-View Images** – This check box determines whether eSlide Manager automatically opens an eSlide or specimen image in ImageScope when you open the details page for that item.
- **eSlide Manager Start Page** – You can define which view you see when you first log on. By default, your start page is set to the main eSlideShare page, but you can choose another view here.
- **New Data Notifications** – This check box tells eSlideShare to email you when a case, project, or case has been shared with you and is available for you to view.

When Someone Shares with You

The preceding sections discuss how to share data on eSlideShare. However, others may also share with you. This section discusses what to do when you receive an invitation to join eSlideShare or receive notification that someone has shared a case, project, or course with you.

Receiving an Invitation to Join eSlideShare

The first time you log into eSlideShare.com you are asked to accept eSlideShare terms and conditions.

The first time someone shares data with you, if you have not already joined eSlideShare, you receive an email message asking you to sign up.

If a case, project, or course has been shared with you, eSlideShare has already set up a user account for you.

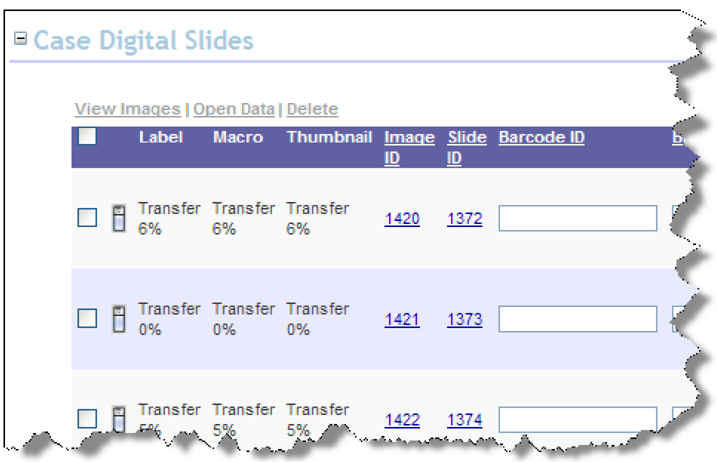
1. Click the link in the invitation email message to go to eSlideShare and log in with the user name and password contained in the email message.
2. You are prompted to change your password.
3. If more than one type of data has been shared with you (clinical, research, or educational), you are asked to choose which type of data you want to view.

Viewing Data Shared with You

When someone shares data with you, you receive an email message from eSlideShare letting you know a case, project, or course is ready for you to view.

As an eSlideShare user, you can control whether or not you receive email notifications of new cases, projects, or courses shared with you on eSlideShare. (See *"eSlideShare Preferences" on page 75*.)

You typically get this email message after all files have been uploaded to eSlideShare, but if you happen to open the shared case, project, or course before all files have been uploaded, you see progress indicators on the page instead of the image thumbnails:



1. Use the appropriate **List All** command on the eSlideShare main page to see the list of cases/projects/courses.
2. Click the icon next to the case/project/course you want to review to open it. Whether or not you can make changes depends on the access level granted to you by the person who shared the data with you.

   If a *case* has been shared with you, there is a place on the details page for your comments or recommendations.

Index

Symbols

- The following symbols may appear on your product label or in this user's guide:

	Manufacturer
	Date of manufacture (year - month - day)
EC REP	European Union Authorized Representative
IVD	In vitro diagnostic device
SN	Serial number
REF	Catalog number
RH	Relative humidity range
	Storage temperature range
	Electronic and electrical equipment waste disposal
	The exclamation point within an equilateral triangle is intended to alert you to the presence of important operating and maintenance (servicing) instructions. *Le point d'exclamation dans un triangle équilatéral vise à avertir l'utilisateur qu'il s'agit d'instructions d'utilisation et d'entretien importantes.*
	The lightning flash with arrowhead symbol within an equilateral triangle is intended to alert you to the presence of uninsulated "dangerous voltage" within the product's enclosure that may be of sufficient magnitude to constitute a risk of electric shock to persons. *Le symbole de l'éclair avec la pointe de flèche dans un triangle équilatéral vise à avertir l'utilisateur que le boîtier du produit présente une « tension dangereuse » non isolée d'une amplitude suffisante pour constituer un risque d'électrocution.*
	The flat surface with waves symbol within an equilateral triangle is intended to alert you to the presence of hot surfaces which could cause burn damage. *Le symbole d'une surface plane et de vagues dans un triangle équilatéral vise à avertir l'utilisateur de la présence de surfaces chaudes qui peuvent causer des brûlures.*
	The UV lamp within an equilateral triangle is intended to alert you to the presence of UV light within the product's enclosure that may be of sufficient magnitude to constitute a risk to the operator. *La lampe UV dans un triangle équilatéral vise à avertir l'utilisateur de la présence de rayonnement UV dans le boîtier du produit qui peut être d'une amplitude suffisante pour constituer un risque pour l'utilisateur.*

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