

# OptosAdvance™ User Account Management



## Purpose

This document provides guidance on user account management in OptosAdvance local instance.

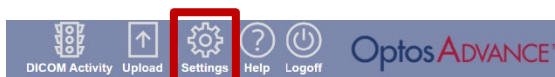
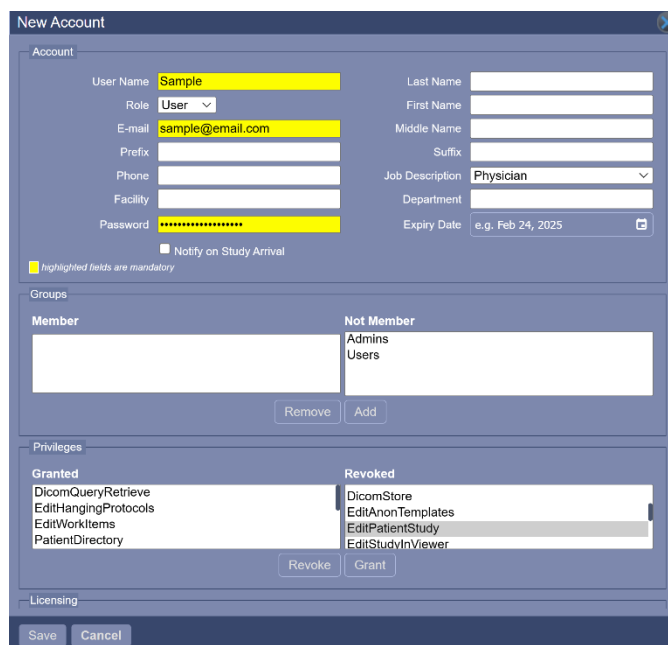
NOTE: Full operating instructions are provided in the **Help** section of OptosAdvance.

## Contents

Purpose.....	1
Add a User Account .....	1
Privilege Descriptions.....	2
Magnify Glass/Smartzoom Box: .....	2
Modality Preferences.....	3
Changing Logout Time.....	3
Edit Password.....	3

## Add a User Account

- 1 | Login to OptosAdvance.
- 2 | Select the **Settings** icon.
- 3 | Under **User Management**, select **Accounts**. Existing OptosAdvance user accounts are displayed.
- 4 | Select **Add**.
- 5 | In the **Account** area, enter the required information, indicated by a yellow highlighted field.
  - **User Name:** Username to login.
  - **Role:** Admin, User, or Guest
    - By default:
      - Guests have no privileges.
      - Users have basic privileges, such as accessing the Patient Study Directory. They cannot edit data.
      - Administrators have full privileges. Only Administrators can manage users.
  - **Email:** Email address
  - **Last Name, First Name, Middle Name, Prefix, Suffix:** Not required fields.
  - **Phone:** Not a required field.
  - **Facility:** Not a required field.
  - **Password:** Password to login to OptosAdvance.

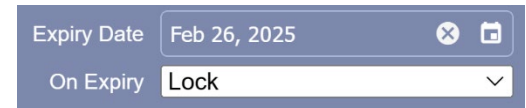



# OptosAdvance™ User Account Management



- **Job Description/Department:** Not a required field.
- **Expiry Date:** Date the user's access to OptosAdvance will expire. Not a required field.

- Select the calendar icon and choose an expiry date. Select whether the user's account will be locked or deleted on the expiry date.



- Select  to remove the expiry date and set the user's access to **Unlimited**.

- 6 | Review and update user privileges in the **Privileges Description** section. These privileges are initially based on the Role and Group assigned but can be modified individually.
  - **Grant a privilege to a User Role:** Select a privilege in the **Revoked** area, then select **Grant**.
  - **Remove a privilege from a User Role:** Select a privilege in the **Granted** area, then select **Revoke**.

- 7 | Select **Save**.

## Privilege Descriptions

The following common privileges are available to a group or user.

**Content download:** Ability to download image/series as a DICOM and "Download Study."

**Content Upload:** Ability to "Upload New Study" and "Attach files to this study/patient."

**CreateAccounts:** Create, modify, and delete user accounts.

**Dicom Delete:** Enables ability to delete image or delete series.

**DICOM Store:** Enables "send series" to Montage.

**EditPatientStudy:** Enables "Edit Image Header" for changing laterality and "Edit Patient/Study" for editing patient information as well as "Merge Studies" or "Merge Patients."

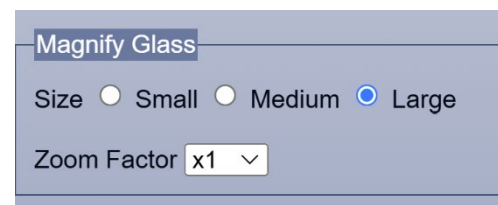
**MprProtocols:** View Slab views for OCT.

**ThreeDProtocols:** View 3D views for OCT.

Note: A full list of Privilege descriptions is available in the OptosAdvance Help Menu by searching Privilege Descriptions.

## Magnify Glass/Smartzoom Box:

- 1 | Login as the new user.
- 2 | Click on **Settings>Preferences>Viewer Preferences**.
- 3 | Click on **Magnify Glass**.
- 4 | Change Size to **Large**.
- 5 | Change **Zoom Factor** x1.
- 6 | Select **Save**.



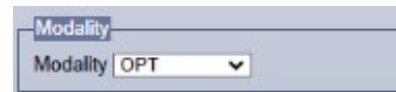
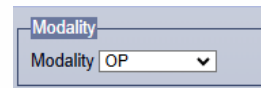
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## Modality Preferences

Modality Preferences must be set for all user accounts.

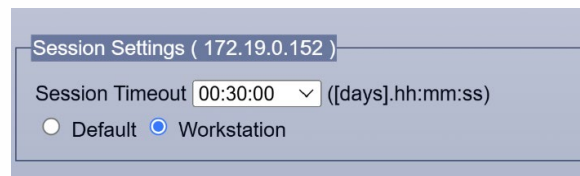
- 1 | From the **Settings** icon, select **Preferences**.
- 2 | Select **Modality Preferences**.
- 3 | Change Modality to **OP**
  - a. Ensure Series Navigation is **None**
  - b. Ensure Create Combines Series is **Yes**
- 4 | Select **Save**.
- 5 | Change Modality to **OPT**
  - a. Ensure Series Navigation is **None**
  - b. Ensure Create Combined Series is **Yes**
  - c. Change Force Isotropic Display to **Yes**
- 6 | Select **Save**.



## Changing Logout Time

Logout time is set per workstation. Default cannot be altered.

- 1 | From the **Settings** icon, select **Workstation Preferences**.
- 2 | Select Workstation.
- 3 | Choose the desired **Session Timeout** from the drop-down menu.
- 4 | Select **Save**.

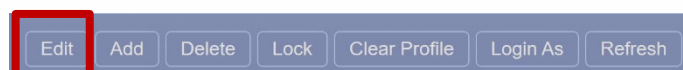


## Edit Password

- 1 | After logging in, select **Settings**.
- 2 | Under **User Management**, select **Accounts**.
- 3 | Select the checkbox next to the desired User Account to edit.



- 4 | Select Edit to change the password. Enter the new password in the field.



- 5 | Select Save.



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