

OptosCloud™ User Account Management



Purpose

This document provides guidance on logging into OptosAdvance™ via OptosCloud, setting up new user accounts, resetting password, and unlocking user accounts.

NOTE: Full operating instructions are provided in the **Help** section of OptosAdvance. Once logged into the software, select the **Help** icon from the toolbar to search and browse guidance topics.

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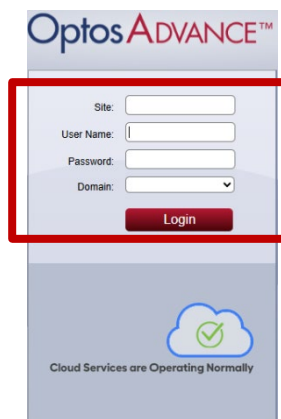
First Time Access

- 1 | Access OptosCloud using the appropriate country-specific link below:

OptosAdvance US	https://cloud.optos.com/
OptosAdvance Canada	https://ca.cloud.optos.com/
OptosAdvance Europe	https://eu.cloud.optos.com/
OptosAdvance Australia	https://au.cloud.optos.com/

Note: OptosAdvance is optimized for use with Google Chrome.

- 2 | Enter your **Optos Site Number**, **User Name**, and **temporary Password** provided to you in the appropriate fields.
- 3 | Select **Login**.



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Setting Up New User Accounts

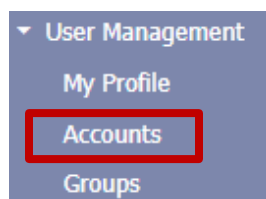
Create new accounts for additional users or for users at other locations. It is recommended that all users have a unique log-in and multiple accounts are set up.

NOTE: If an employee leaves, lock their account to protect PHI. If using a shared account, the password must be changed to prevent unauthorized access.

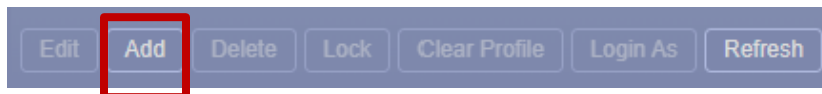
1 | After logging in, select **Settings**.



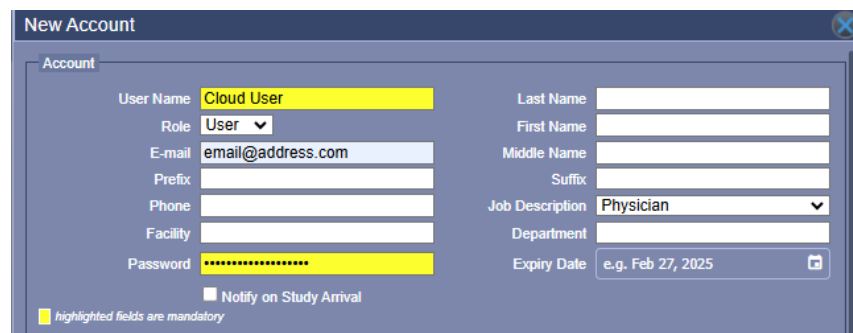
2 | Under **User Management**, select **Accounts**.



3 | Select **Add** from the menu at the bottom of the screen.



4 | Complete the required fields as indicated by a yellow highlight using the guidance below.



New Account

Account

User Name **Cloud User** Last Name

Role **User** First Name

E-mail **email@address.com** Middle Name

Prefix Suffix

Phone Job Description **Physician**

Facility Department

Password ********* Expiry Date **e.g. Feb 27, 2025**

☐ Notify on Study Arrival

highlighted fields are mandatory

Account Section

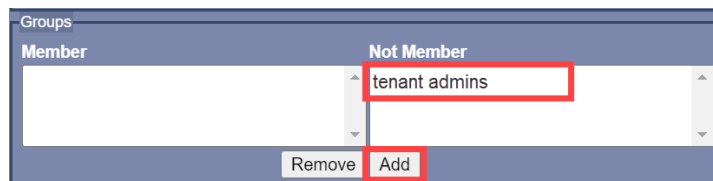
- **User Name:** User name to login.
- **Role:** Select User.
- **Email:** Email address.
- **Password:** Minimum of 8 characters including upper-case, lower-case, numbers, and/or special characters.

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Group Section

- **For elevated privileges:** From the Not Member column, select **tenant admins** then **Add**.



- **To manually add privileges:** From the Revoked column, select the desired privilege from the list and select **Grant**.



5 | 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.

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.

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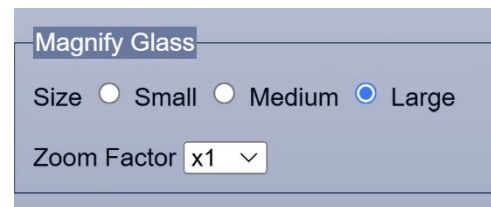
Modality Preferences

Modality Preferences must be set for each unique account login.

- 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**.

Magnify Glass/Smartzoom Box

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



Edit Password for Unlocked Accounts

- 1 | After logging in, select **Settings**.



- 2 | Under **User Management**, select **Accounts**.



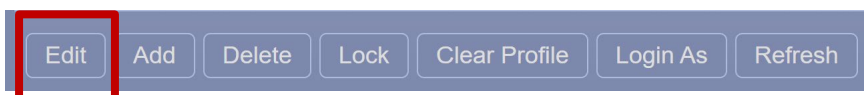
- 3 | Select the **checkbox** next to the desired User Account to edit.



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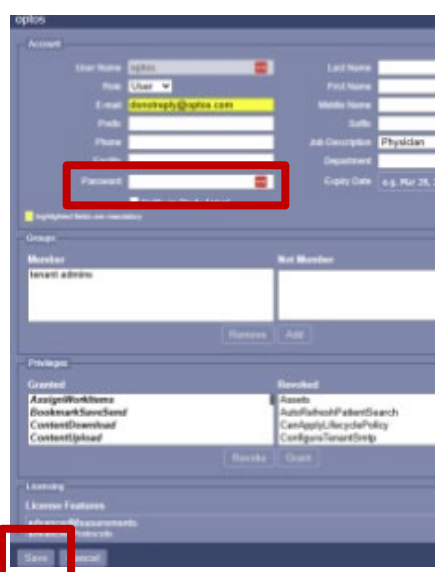


4 | Select **Edit** to change the password.



5 | Enter a new password in the password field. Passwords must contain a minimum of 8 characters including upper-case, lower-case, numbers, and/or special characters.

6 | Select **Save** to retain your changes.

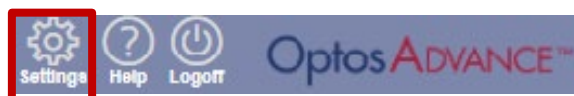


Unlocking User Accounts

User accounts will lock if you incorrectly enter a password three (3) times within five (5) minutes. If one user account is locked, another user account can login to unlock the account. NOTE: Locked user accounts will display a red lock icon. Do not proceed with these steps if the red lock icon is missing.



1 | After logging in, select **Settings**.



2 | Under **User Management**, select **Accounts**.



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- 3 | Select the **checkbox** next to the locked User Account to edit. Verify the red lock icon is visible.



- 4 | Select **Lock** to unlock the user account.

NOTE: The Lock button is a toggle button. If the user account is not locked as indicated by the red lock icon, selecting this button will lock the user account.



- 5 | If the unlocked user account requires a password reset, follow the steps in Edit Password for Unlocked Account.

If needed, contact Optos Support at **800-854-3039** to issue a temporary password.

