VANTAGE workflow solution

Addendum to VANTAGE workflow solution User Guide
Software version 2.8.1
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Publication information

Addendum version	Software version	Revision date	Change description
1.0	2.8.1	December 2021	Initial version. Addendum documentation for software version 2.8.1.

Revision history

Edition notice

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What is new

The VANTAGE workflow solution User Guide and User Assistance, publication version 2.0, covers software version 2.8. The latest software release is version 2.8.1. This addendum describes updates and features that are new in VANTAGE workflow solution v2.8.1. This addendum supplements publication version 2.0 of the user guide.

The updates and new features are described briefly below. Details and instructions for the changes are in the referenced sections.

User guide software and data security safety notices

Additional cybersecurity notices were added to the safety section for software and data security.

Software and data security (7)

Order management item details

A search function was added to all drop-down lists in order entry, when creating or modifying a case.

You can also create item details from order entry to be assigned within the case.

Searching and creating case order item details from order entry (9)

Grossing workstation - Tissue pieces and baskets

Assigning tissue pieces and baskets on the grossing workstation was moved to separate screens. You can now apply a basket to all blocks, instead of individually.

Assigning tissue pieces and baskets to a cassette (10)

Auto-cancellation

Order items are automatically canceled if all sub-items are canceled in the software. This function can be enabled or disabled.

Configuring auto-cancellation (11)

Standardized name format

Names can be configured to display in a specified format across the software.

Configuring name format (12)

Requiring a reason when adding a slide

The setting to require a reason when a slide is added at Cytology was moved to the VENTANA Connect settings page. The setting now applies to the Grossing, Microtomy, and Cytology workstations.

Requiring a reason to add a slide (13)

Maintenance page

Enabling the Maintenance page can be configured at installation. Depending on the installation configuration, the page might not be available to users at that site.

Access to the maintenance page (14)

Portlets page

The Portlets page was removed from the web portal.

Removal of the portlets page (14)

Data analytics feature

LabOPs AP can be accessed through the Data Analytics link in the web portal.

Data analytics (15)

Printing templates

Custom printing templates can be imported and exported.

Importing and exporting printing templates (16)

Pathologists and users

Pathologist information from orders is saved in the VANTAGE software and can be associated with users with the pathologist user role.

The list of users in the software can also be searched and filtered.

Managing pathologists (17)

Software and data security

Unauthorized system access and data loss

External storage devices can transmit computer malware, which may be used to gain unauthorized access to data or cause unwanted changes to software.

The system is not protected against malicious software and hacker attacks.

The operators are responsible for the IT security of their IT infrastructure and for protecting it against malicious software and hacker attacks. Failure to do so may result in data loss or may render the system unusable.

Roche recommends the following precautions:

- Allow connection only to authorized external devices.
- To protect all external devices, make sure that you use appropriate security software.
- To protect access to all external devices, make sure that you use appropriate security equipment. Your Roche Service representative can recommend a suitable firewall.
- Secure attached networks and wireless networks used in connection with the software.
- Restrict access to the system and attached infrastructure.
- Do not copy or install any software on the system unless it is part of the system software or your Roche Service representative tells you to do so.
- If extra software is required, contact your Roche Service representative to ensure validation of the software in question.
- Do not use the USB ports to connect other storage devices unless your Roche Service representative or an operating instruction tells you to do so.
- Exercise care when you use external storage devices such as USB drives, CDs, or DVDs. Do not connect to the system any external storage device that you use on public or home computers.
- Keep all external storage devices in a secure place, and make sure that only authorized personnel can access them.
- Back up your data regularly.
- Transmit and store backups and archive files securely.

Corrupt data due to a disclosed password

The security of the system and its data depends on the password-protected access. If an unauthorized person discovers your user ID and password, they could compromise this security.

- Do not share user accounts.
- Always enter your password unobserved.
- Do not write down your password anywhere, including in a contact form, in the address book, or in a file on the computer.
- Do not disclose your password to anyone. Roche will never ask you for your password.
- If you ever disclose your password to anyone, change it immediately afterwards.
- Contact your local Roche affiliate if you think your account is compromised.

Non-approved third-party software

Installation of any third-party software that is not approved by Roche Diagnostics may result in incorrect behavior by the system.

- Install only approved third-party software.

Unreliable validation due to unauthorized changes to the validation settings

The manufacturer shall not be held liable for any consequences resulting from subsequent, unauthorized modifications to the accepted validation settings included in the system at the customer’s request.

- Ensure that only authorized personnel can change, if necessary, the validation settings.

Roche provided firewall

To improve the security of Roche systems, a Roche provided firewall or customer provided firewall is recommended. All new systems connected to the customer network may be installed with the hardware firewall provided by Roche.

- Installation of the Roche provided firewall is an effective method for adding an additional security layer between Roche products and the customer laboratory network.
- The use of the Roche provided firewall requires you to assign static IP addresses to Roche computers. The static IP addresses are reserved in order for the Roche computer to work properly.
- Do not move, unplug, or reconfigure the Roche provided firewall. Contact Roche support for assistance.

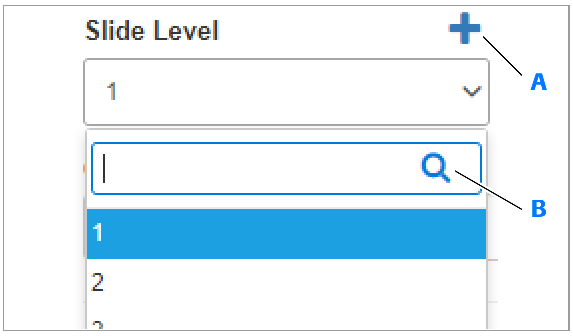
Searching and creating case order item details from order entry

In addition to creating case item details and options from the **Admin** menu, you can also create them in order entry. Details must be configured before they can be assigned.

Details include the following:

- Requesting facilities
- Requesting physicians
- Assigned pathologists
- Tissue and sample types
- Block tissue subtypes
- Slide levels
- Surgical procedures
- Stain protocols
- Block and aliquot protocols
- Specimen protocols
- Special instructions
- Quality issues and resolutions

Searching item details



A Create new item details to choose from.
B Search for existing item details to assign.

All item details that you can assign are listed in the field drop-down lists.

You can use the search field in the drop-down lists to search for details to assign. In the special instructions drop-down list, you can select multiple options.

Make sure the following prerequisites are completed before starting this procedure.

- ☐ You are logged on to the web portal.
- ☐ You have the necessary privileges assigned.
- ☐ You are creating or editing a case.

To create an item detail

1. Choose the button next to the detail field.
2. Enter the necessary fields.
   - The item detail is automatically active.
3. Choose the **Save** button.
   - → The item detail is created and can be assigned.

Assigning tissue pieces and baskets to a cassette

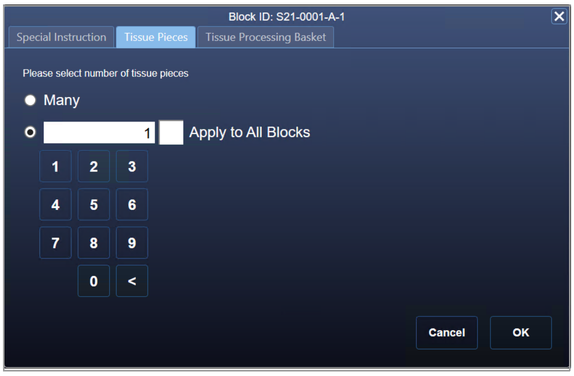
Previously, you could specify the number of tissue pieces and assign a tissue basket for a block on the same screen at the Grossing workstation. Now, it is done on separate tabs at the Grossing workstation, with the option to apply the basket to all blocks.

Make sure the following prerequisites are completed before starting this procedure.

- ☐ Tissue processing is enabled.
- ☐ Tissue processing baskets are created.
- ☐ You are logged on to a Grossing workstation.

To assign tissue pieces

1. Scan the specimen, or enter the case ID manually using the virtual keyboard.
   - → A specimen selection window displays if the scanned case ID is associated with multiple specimens.
2. If necessary, in the specimen selection window, choose the specimen, and then choose the **OK** button.
3. Choose the button next to the cassette.



4 Choose the **Tissue Pieces** tab.

5 Choose the number of tissue pieces to assign.

6 To apply the tissue pieces on all tissue blocks associated with the current specimen, select the **Apply to All Blocks** check box.

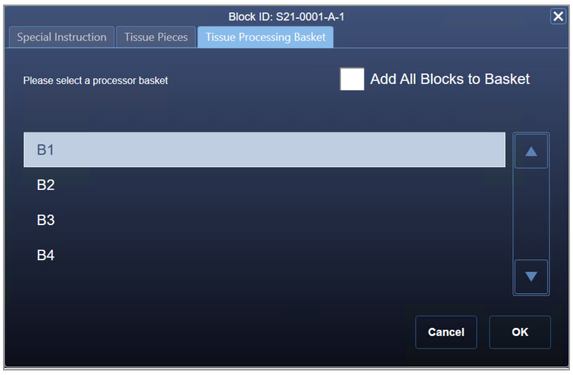
7 Choose the **OK** button.

To assign tissue baskets

1 Scan the specimen, or enter the case ID manually using the virtual keyboard.
   → A specimen selection window displays if the scanned case ID is associated with multiple specimens.

2 If necessary, in the specimen selection window, choose the specimen, and then choose the **OK** button.

3 Choose the  button next to the cassette.



4 Choose the **Tissue Processing Basket** tab.

5 Choose a tissue processor basket to assign the block to.

6 To add all tissue blocks associated with the current specimen to the same basket, select the **Add All Blocks to Basket** check box.

7 Choose the **OK** button.

Configuring auto-cancellation

Cascading auto-cancellation allows the software to automatically cancel parent order items if all sub-items are canceled. Items can be canceled through the LIS or through the VANTAGE software.

Canceling cases

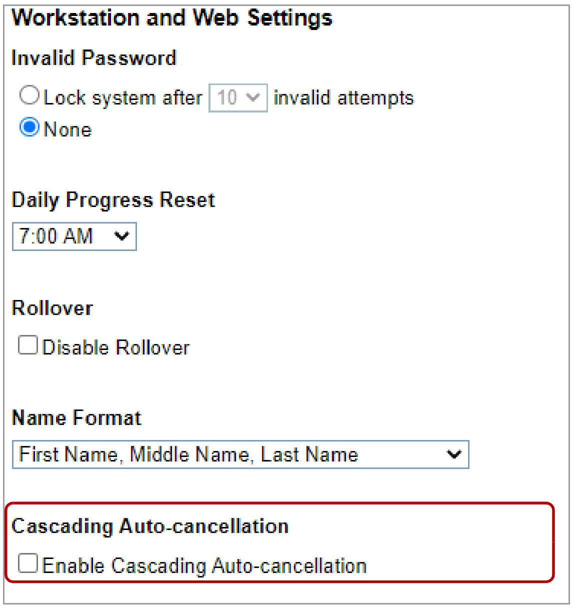
A case cannot be automatically canceled. Instead, you can deactivate the case.

VIP host If a VENTANA Interface Point (VIP) host is enabled, then items cannot be canceled.

Make sure the following prerequisites are completed before starting this procedure.

- ☐ You are logged on to the web portal.
- ☐ You have the necessary privileges assigned.

To enable or disable auto-cancellation



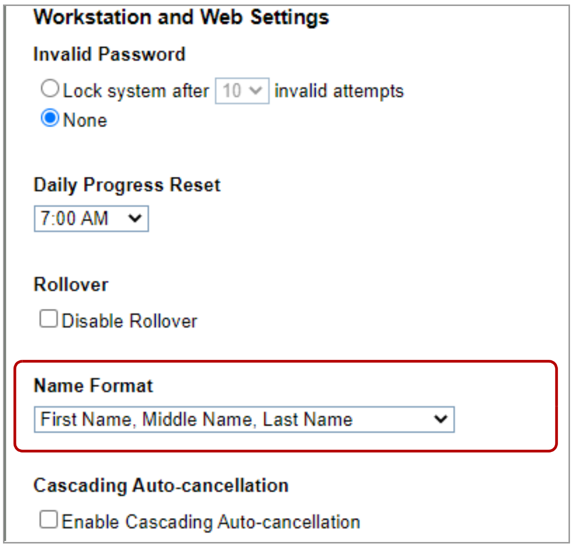
1. Choose **Admin > System > Settings**. Locate **Workstation and Web Settings**.
2. To enable or disable auto-cancellation, select or clear the **Enable Cascading Auto-cancellation** check box.
3. Choose the **Save** button.

Configuring name format

You can configure how names display in the software. This format does not apply to requesting physician names.

Make sure the following prerequisites are completed before starting this procedure.

- ☐ You are logged on to the web portal.
- ☐ You have the necessary privileges assigned.



To configure the name format

1. Choose **Admin > System > Settings**. Locate **Workstation and Web Settings**.
2. For **Name Format**, choose how you want names to display.
3. Choose the **Save** button.

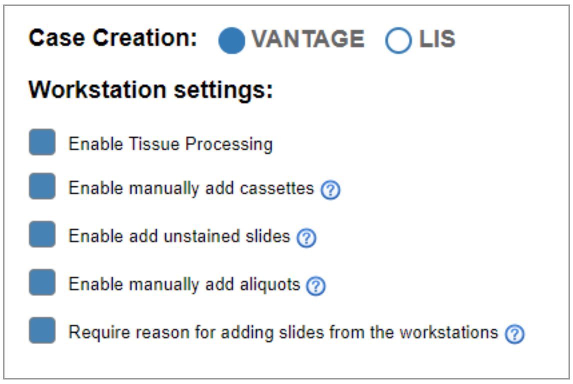
Requiring a reason to add a slide

Previously, you could configure the software to require a reason, or quality issue and resolution, to be assigned when a slide is added to a case from the Cytology workstation. Now, you can configure this setting to be applied to all workstations (Grossing, Microtomy, and Cytology).

This setting is no longer on the Cytology configuration page in the web portal.

Make sure the following prerequisites are completed before starting this procedure.

- ☐ You are logged on to the web portal.
- ☐ You have the necessary privileges assigned.
- ☐ Contact Roche support



To require a reason

1 Choose **Admin > Connectivity > VENTANA Connect software**.

2 To require a reason, or quality issue, when a new slide is added at the workstations, select the **Require reason for adding slides from the workstations** check box.

3 Choose the **Save** button.

Access to web portal pages

In this section

Access to the maintenance page (14)
Removal of the portlets page (14)

Access to the maintenance page

Roche support can configure user access to the Maintenance page at installation.

To access the Maintenance page in the web portal, it must be enabled during installation. For more information, contact Roche support.

If the Maintenance page is enabled, you can access it by choosing **Admin > System > Maintenance**.

Removal of the portlets page

The **Portlets** page can no longer be accessed from the **Informatics** menu in the web portal. You can still use the **Home** page to view portlets.

Data analytics

In this section

Opening data analytics (15)
Configuring data analytics (15)
User permissions for accessing data analytics (16)

Opening data analytics

If configured, you can access the LabOPS AP data analytics dashboard through the VANTAGE software.

Make sure the following prerequisites are completed before starting this procedure.

- You are logged on to the web portal.
- You have the necessary privileges assigned.
- Data analytics is enabled.

To view data analytics

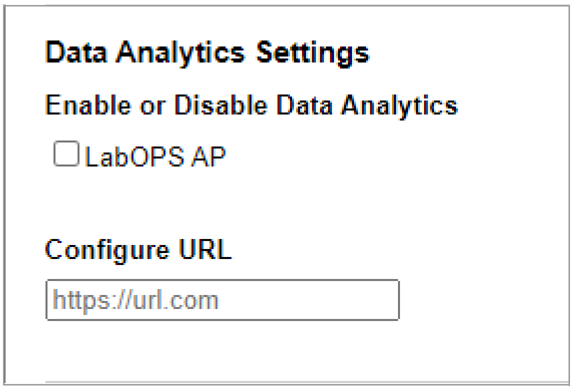
1 Choose **Informatics > Data Analytics**.
   → The data analytics dashboard is displayed in a new tab or window.

Configuring data analytics

You can configure the connectivity settings between the VANTAGE software and the LabOPS AP software. When enabled, users can open the LabOPS AP dashboard URL from the VANTAGE software.

Make sure the following prerequisites are completed before starting this procedure.

- ☐ You are logged on to the web portal.
- ☐ You have the necessary privileges assigned.
- ☐ Contact Roche support.



To configure data analytics connection

1 Choose **Admin > System > Settings**. Locate **Data Analytics Settings**.

2 To enable data analytics, select the **LabOPS AP** check box.

3 Enter the LabOPS AP URL in the **Configure URL** field.

4 Choose the **Save** button.

User permissions for accessing data analytics

A new role was created to grant permissions to users to access **Informatics > Data Analytics** in the web portal. In addition, the WP-Informatics permission now only provides access to the Reports page.

Privilege	Description
WP-Informatics	Enables the Informatics tab and provides access to Reports
WP-Data Analytics	Allows users to access Data Analytics

List of new and updated user role privileges

Importing and exporting printing templates

You can import and export custom printing templates.

Preconfigured printing templates cannot be exported. Instead, you can create a copy of the template, and then export the copy.

Custom templates can be imported and exported in JSON file format.

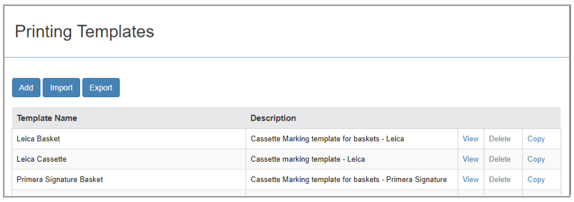
Make sure the following prerequisites are completed before starting this procedure.

- ☐ You are logged on to the web portal.
- ☐ You have the necessary privileges assigned.

To import templates

1 Verify that the template file format is JSON.

2 To import multiple templates together, create a ZIP file of all template JSON files.



3 Choose **Admin > System > Printing Templates**.

4 Choose the **Import** button.

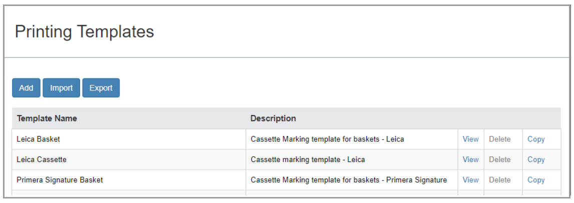
→ The **Open** dialog box is displayed.

5 Navigate to the file that you want to import. Select the template file to import, and then choose the **Open** button.

- To import a single template, select the JSON file.
- To import multiple templates, select the ZIP file containing all template JSON files.

→ The templates are imported.

To export templates



1 Choose **Admin > System > Printing Templates**.

2 To export all custom templates, choose the Export button.

→ A ZIP file containing all custom template JSON files is downloaded.

3 To export a single custom template, do the following:

- Choose **Edit** next to the template.
- Choose the **Export** button.

→ A ZIP file containing the template JSON file is downloaded.

Managing pathologists

You can assign pathologists to a case. The list of pathologists that you can assign can be managed in the web portal.

Assigned pathologists

Assigned pathologists are pathologist names assigned to a case order. You can create new names, or use existing names from existing orders.

To create or edit an assigned pathologist ▶ (18)

Pathologists from LIS

Pathologist information that comes with a unique code or ID from the LIS is automatically saved in the VANTAGE software as an assigned pathologist. A unique pathologist code is required to identify the pathologist.

If the LIS does not send a pathologist code with a case, the pathologist information is not saved in the VANTAGE software.

Associating users and pathologists

You can also associate assigned pathologists to specific VANTAGE software users. Users must be assigned the Pathologist role, a preconfigured user role that can be edited.

To associate a user to a pathologist ▶ (19)

Make sure the following prerequisites are completed before starting this procedure.

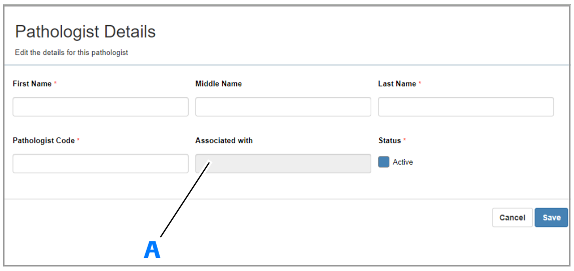
- ☐ You are logged on to the web portal.
- ☐ You have the necessary privileges assigned.

▶ To create or edit an assigned pathologist

1 Choose **Admin > Workflow > Order Management > Pathologists**.

2 Do one of the following:
- To create a new pathologist, choose the **Add** button.
- To edit an existing pathologist, choose the ✎ button next to the pathologist.

ⓘ To filter the list, use the drop-down lists at the top. To sort the list, select a column header.



A VANTAGE software user that the pathologist is associated to.

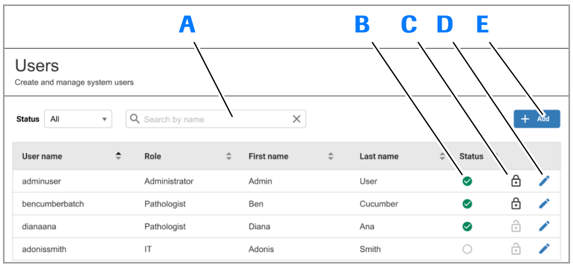
3 Enter the pathologist name.

4 Enter the pathologist's code, or unique ID.

5 Select the **Active** check box to activate the pathologist, or clear the check box to deactivate it.

6 Choose the **Save** button.

To associate a user to a pathologist



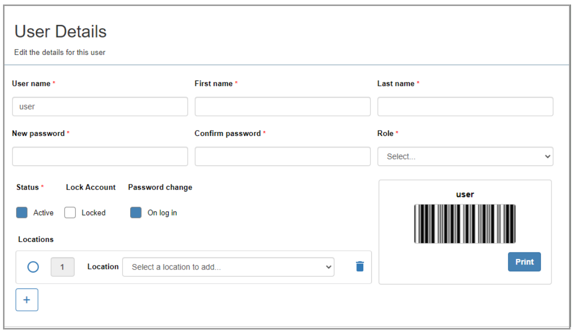
A Search for a user.
B User account is active.
C User account is locked.
D Edit the user account.
E Create a new user account.

1 Choose **Admin > Security > Users**.

2 Do one of the following:

- To add a new user account, choose the **Add** button.
- To edit an existing user account, choose the button next to the account.

To filter the list, use the drop-down lists at the top. To sort the list, select a column header.

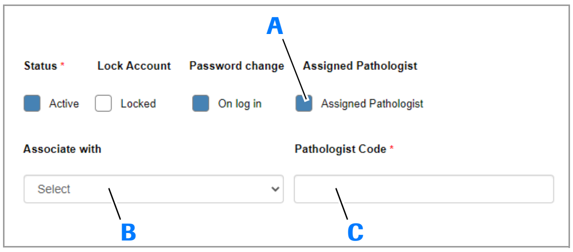


3 Enter user details.

4 From the **Role** drop-down list, choose **Pathologist**.

The user will have all privileges configured in the pathologist user role.

→ The **Assigned Pathologist** check box is displayed.



A The **Assigned Pathologist** check box is displayed for users with the pathologist user role.
B Choose from existing pathologists to associate with the user.
C Create a new assigned pathologist to associate with the user.

5 Select the **Assigned Pathologist** check box.

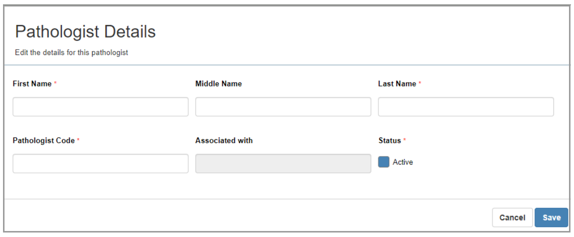
The user can be associated with pathologists that can be assigned to a case order.

→ Additional fields are displayed.

6 Do one of the following:

- To associate the user with an existing assigned pathologist, choose the pathologist name from the **Associate with** drop-down list.
- To create a new assigned pathologist from the user, enter the unique ID or code for the pathologist in the **Pathologist code** field.

7 Choose the **Save** button.



To activate or deactivate an assigned pathologist

1 Choose **Admin > Workflow > Order Management > Pathologists**.

2 Choose the button next to the pathologist.

3 Select the **Active** check box to activate the pathologist, or clear the check box to deactivate it.

4 Choose the **Save** button.