Learning To Use Your

SECOND OPINION™

PROFESSIONAL

Version 8.5

Second Opinion Telemedicine Solutions, Inc.

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Start Here

Welcome to **Second Opinion Professional**. This powerful multimedia management and communication software combines image/data capture, storage, and transmission in a sophisticated, yet easy-to-use program. Whether you are an individual who simply wants to organize an existing collection of images, media clips, other documents, and data, or an organization that wants to standardize collection, display and sharing data, you will benefit from using this software.

Second Opinion Professional lets you gather images, sound and video from many devices, including most scanners (print, slide, film), digital cameras, digital video (USB, 1394/firewire) and analog video devices (scope or camera). You can also gather any other documents, including text notes, word processor files, spreadsheets, presentations, and even database records (using specially designed **Second Opinion Professional** add-ins). Finally, you can output images to any computer printer (color, slide, photograph, or film) as well as measure and annotate them.

Second Opinion Professional stores all documents in easily retrievable folders. Folders contain identification and demographic information and can be keyed to match whatever numbering system you are currently using. Separate comments and notes can be associated with each document, as well as instrument settings and calibrations.

Second Opinion Professional also has security features that include encryption, user login, user rights, and user activity tracking.

About this Tutorial

This tutorial includes a number of lessons, each with specific tasks. It assumes that you have a basic understanding of the Microsoft Windows 10 or above operating systems, including starting applications, working with Windows, and using the mouse. If you are not familiar with or confident in this environment, we strongly suggest following the tutorials that are provided with those systems before attempting to use **Second Opinion Professional**.

After completing this Tutorial, you will understand the basic concepts of **Second Opinion Professional** and have a familiarity with the fundamental skills you need to use the software efficiently.

Depending on the components you purchased or installed with the program, you may or may not have access to all of the functions described here.

These instructions are based on a new installation of **Second Opinion Professional** and assume you have full security rights to all of the program's features. Also, some lessons build on previous ones, so you are encouraged to follow the lessons in order.

For comprehensive instructions on how to install the program, see the "**Installing Your Second Opinion Professional**" guide.

For comprehensive information on all of the program's features and how to perform specific tasks, see the "**Using Your Second Opinion Professional**" guide.

For comprehensive information on all of the program's security features and instructions on how to manage the operation, user accounts and security privileges of the program, see the "**Configuring and Managing Your Second Opinion Professional**" guide.

Lesson 1

Learning the Basics

This lesson orients you to the **Second Opinion Professional** environment, and explains basic concepts needed to use the program successfully. You do not need any of the optional components or specific hardware to run this lesson.

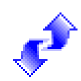
You will start the program, log in, and open a sample folder that was copied to your system during installation of the **Second Opinion** program. You will then open a picture, practice manipulating it, and print images.

Finally, you will log out of **Second Opinion**.

Step 1. Start the Program

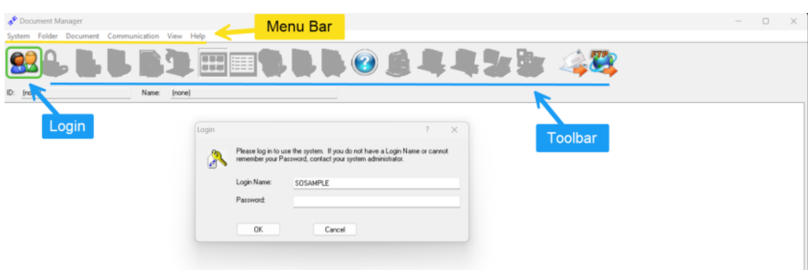
To begin this tutorial, launch **Document Manager**, the main application and central interface element of **Second Opinion Professional**.

- Click the **Windows Start button**, then click **All Programs**, **Second Opinion**, and choose **Second Opinion Professional**.



Document Manager application icon

The **Document Manager** window should appear with the **Login** dialog box in front.



If the **Login** dialog box is not visible, click on the **Login** button on the toolbar.

The **Document Manager** window contains the **Title Bar**, **Menu Bar**, **Standard Toolbar**, **Communications Toolbar**, **Folder Information area**, **Document List area**, and the **Status Bar**. The Menu Bar gives access to all the available commands. The toolbars give easy access to the most common of those commands. The **Folder Information** area displays information about the current open folder; the **Document List** area displays the documents in the current folder. The **Status Bar** shows helpful information about the current command.

You cannot access the Menu Bar or Toolbars while the **Login** dialog box is open.

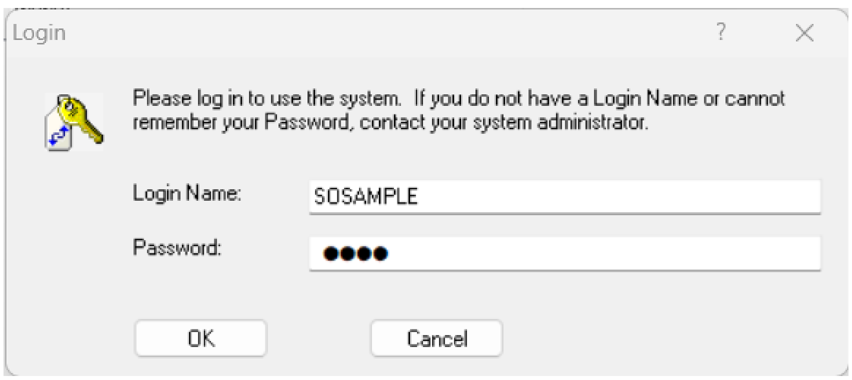
Step 2. Login

The **Login** dialog box appears automatically each time you start **Second Opinion**. **Second Opinion's** security model allows the administrator of a site to define the access level of each individual user. For example, some users may be allowed to edit or create information, while others can only view it.

For this tutorial, we will log in using one of the pre-defined user accounts that ship with the program. If your system administrator has altered or removed these accounts, you may use a different account. For more information on setting up user accounts, please read the "**Configuring and Managing Your Second Opinion Professional**" guide.

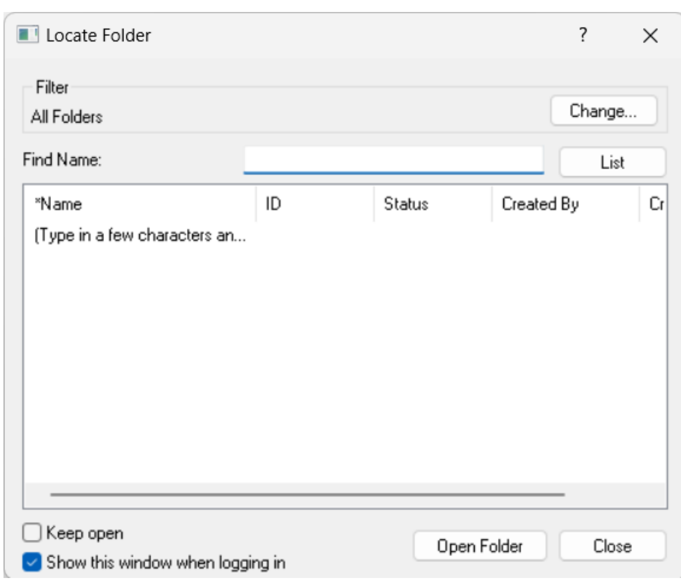
The sample users should be removed or their passwords changed once the system contains real information.

1. Enter a **Login Name** of "SOSAMPLE".
2. Enter a **Password** of "1234". To prevent anybody from seeing what you type, any character you enter in this box will appear as an asterisk (*) or security circle.

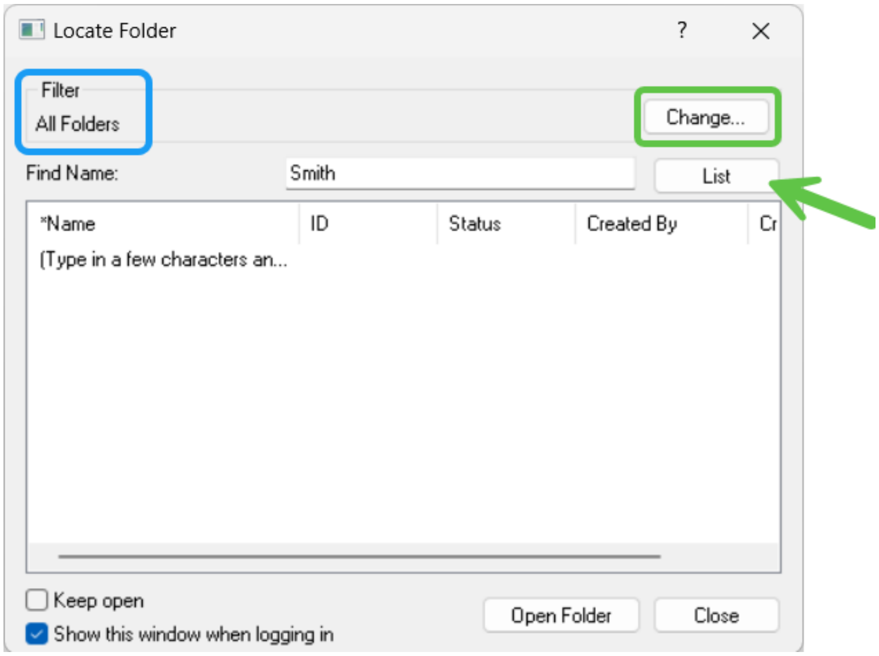


If the **Locate Folder** window does not appear, then this feature has been disabled.

3. Click **OK**. When you do, the **Locate Folder** window usually appears automatically to allow you to choose an existing folder.



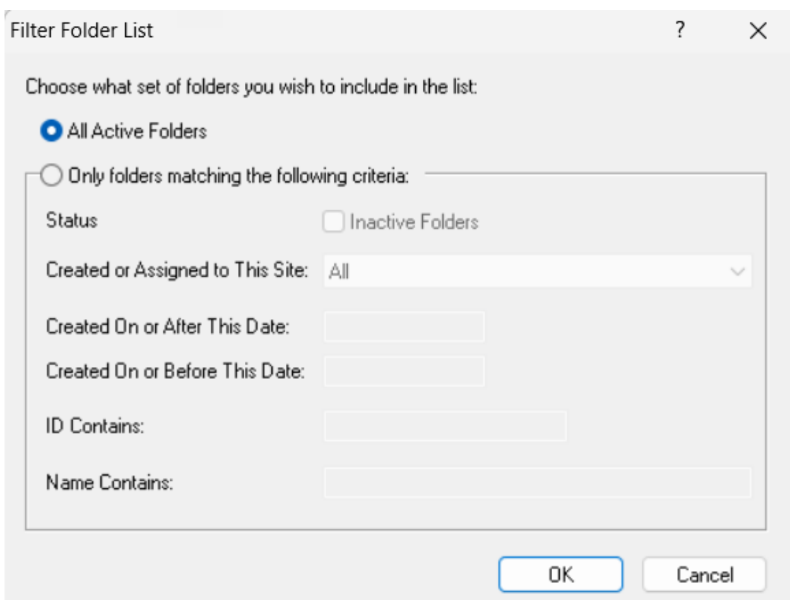
If the **Locate Folder** window is not open, open the **Folder** menu and click **Locate Folder.**



You can also click on the **Locate Folder** button in the toolbar.

To narrow down the list of folders, type in a few characters of the folder you are looking for, then click **List**.

Clicking the **Change** button on the top right opens up the **Filter Folder List** window. This window has more advanced options to narrow down the list even more.



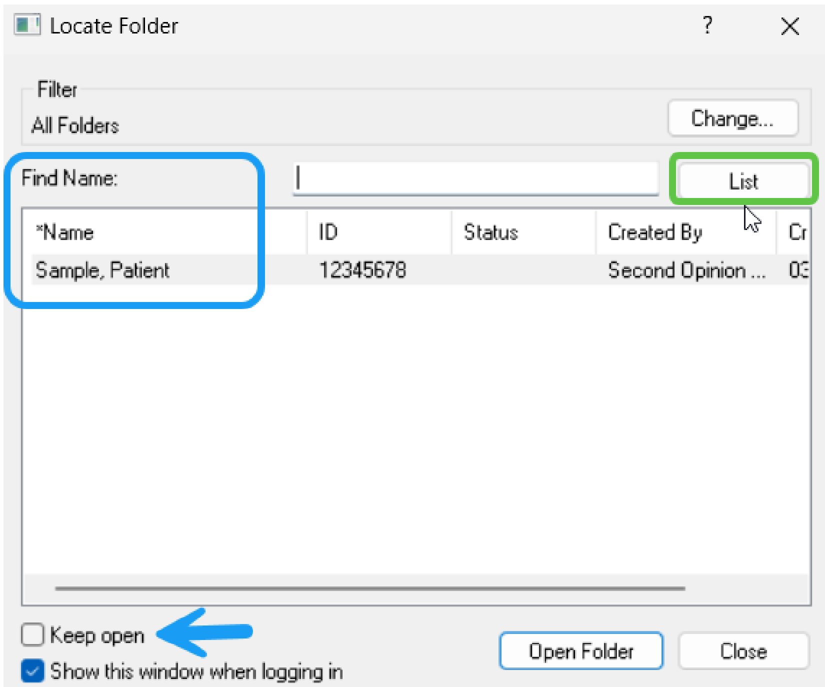
The **Filter Folder List** contains additional field selections to help narrow down the folder listing. You can use all the fields listed here in your selection process.

When a **Selection Filter** is activated, folders matching the selection criteria will be shown in the **Locate Folder** window.

Step 3. Open the Sample Folder

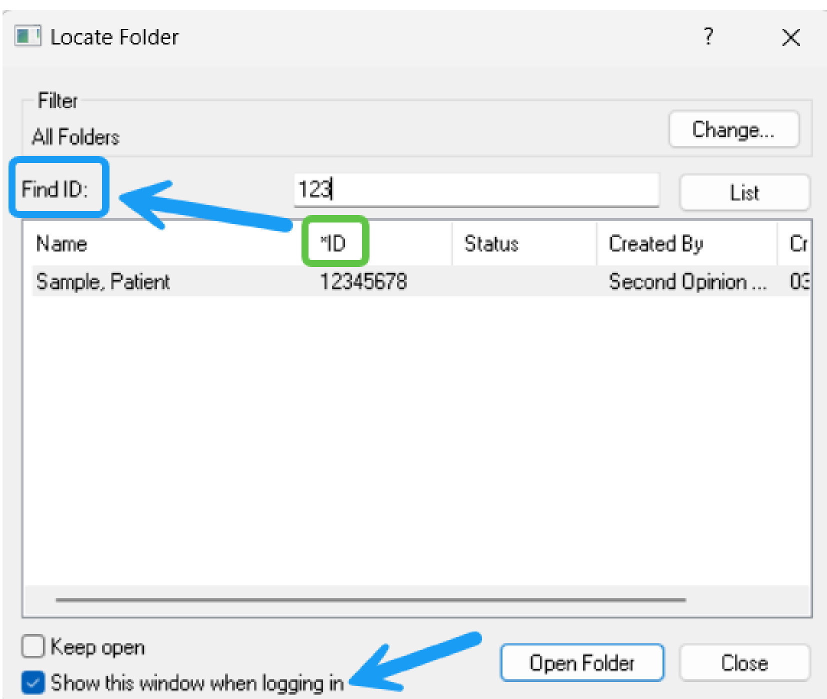
Second Opinion stores information in folders. To work with documents, you must first open a folder. We will open the sample folder that was copied to your system during installation.

1. In the **Locate Folder** window, click **List**.
2. Click on the “Sample, Patient” text to select that entry.



The information in the **Locate Folder Listing** can be sorted by clicking on the column headers of the search results section. The column header with the asterisk represents the current sort order.

The **Keep open** check box when selected, allows you to **double-click** a folder in the list; the program will open that folder and keep the **Locate Folder** window open.

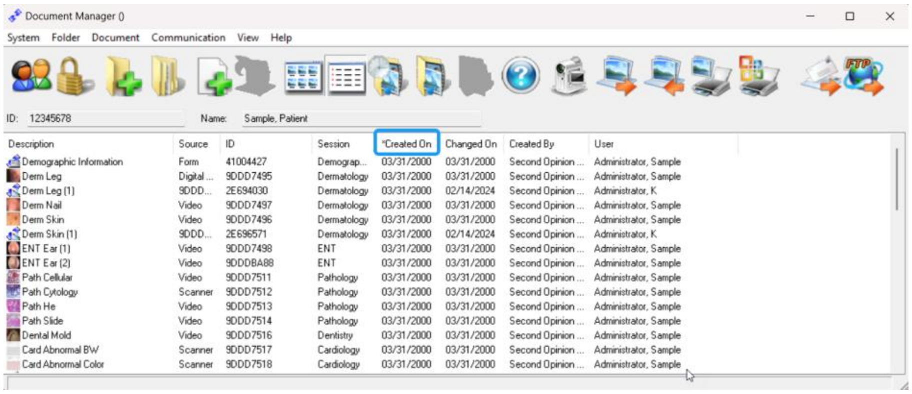


To find a folder by the **Folder ID**, click on the **ID** column header. To find a folder by **Status**, click on the **Status** column header and so on.

The **Show this window when logging in** check box sets the property that determines whether or not the **Locate Folder** window appears after a successful login. Clinical sites that typically create folders on a regular basis would uncheck or disable this feature.

3. Click **Open Folder**. The folder now becomes the current active folder and its documents are displayed in the **Document List** area.

You can also **double-click** a folder to open it.



Details view is currently selected.

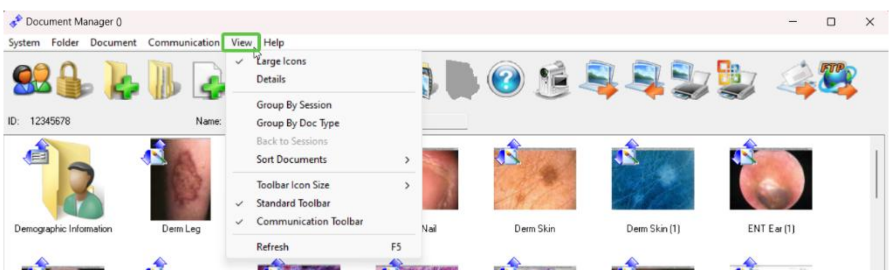
The sort order of the documents can be changed by clicking on the corresponding column header.

The column header with the asterisk represents the current sort order.

Change the Way Documents are Listed

You can change the way the documents are listed to see more or less information.

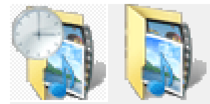
1. Click on the **View** menu. Notice that as you move the mouse pointer across the various menu commands or toolbar buttons, the Status Bar updates to display what the command does. Additionally, if you hold the pointer over a toolbar button, a small window called a **ToolTip** appears next to it, naming the command.



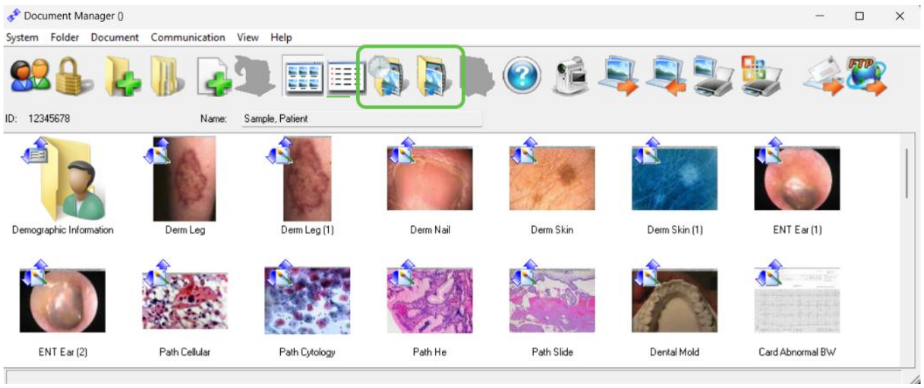
2. Click on **Large Icons** to see thumbnail representations of the documents, or **Details** to see the detailed document information.

You can also click on the **View** buttons to switch back and forth between **Detail** and **Large Icon** views.

3. Click on **View** menu, then click on **Group by Session** to see documents grouped by individual sessions or **Group by Doc Type** to see documents grouped by document types (images, videos, forms).



You can also click on the **Group by Session** or **Group by Doc Type** buttons.



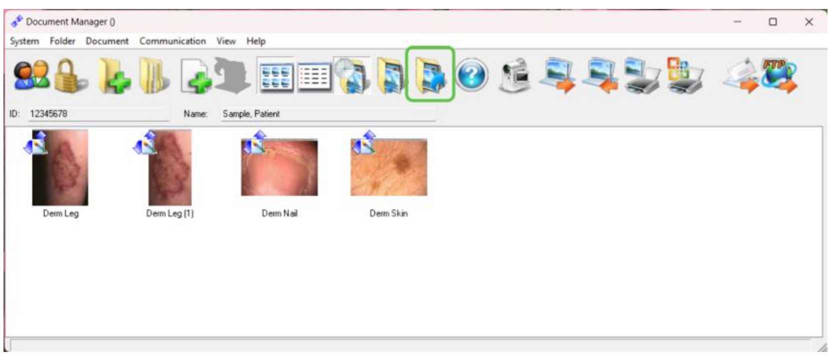
Group by Session view selected.

4. **Double-click** the session labeled Dermatology and you will see the documents contained in that session.

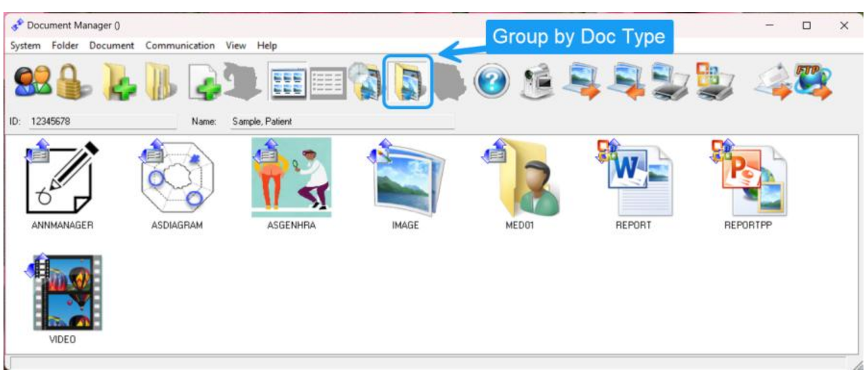
5. Click on **View** menu, then click on **Back to Sessions** to return to the sessions view.

You can also click on the **Back to Session** button

You can also click on the **Group by Session** button to exit the sessions view.



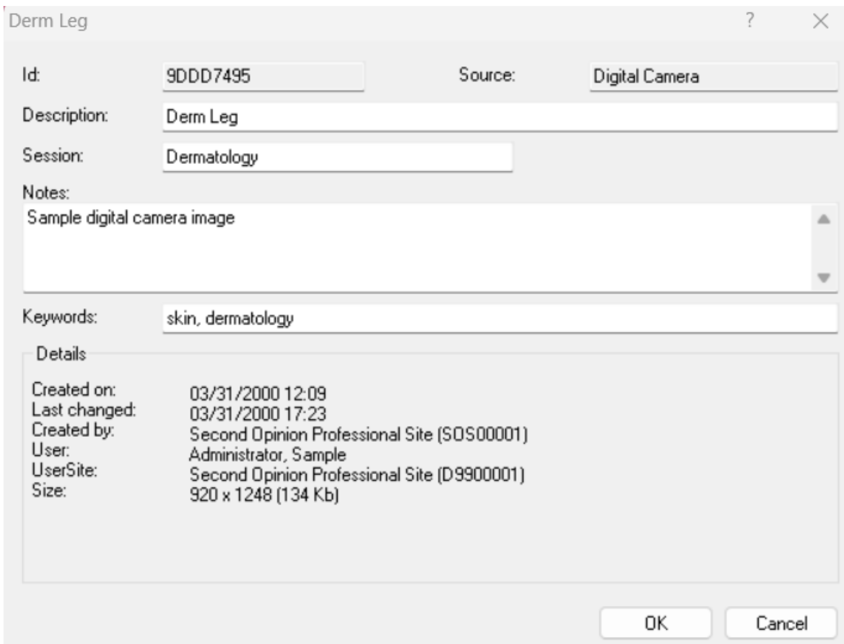
6. Click on **View** menu, then click on **Group by Doc Type** to exit the sessions view.

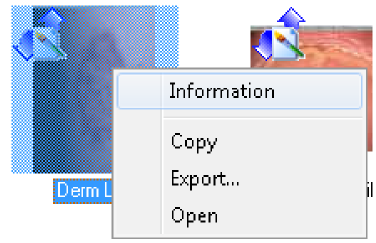


Step 4. View Document Information

You can view the information associated with a document, including any notes.

1. Click on the “Derm Leg” entry to select it.
2. Click on the **Document** menu.
3. Click on **Information**. A window with the document’s information will appear.





Using your mouse, you can also **Right Click** on the document and a quick menu will appear, then click **Information**.

If you did not originally create the Derm Leg image, you are not allowed to edit any of the information; you can only view it.

Id contains the unique Id of the document (no two documents in the same folder will have the same Id). The **Description** field contains the name of the document. The **Notes** field contains any additional information about this document. **Details** contains the name of the site that created the document, the unique Id of that site (Site Ids are assigned by Second Opinion Telemedicine Solutions, Inc.), the date and time the document was captured, and the document’s physical size.

4. Click **OK** to close the dialog box.

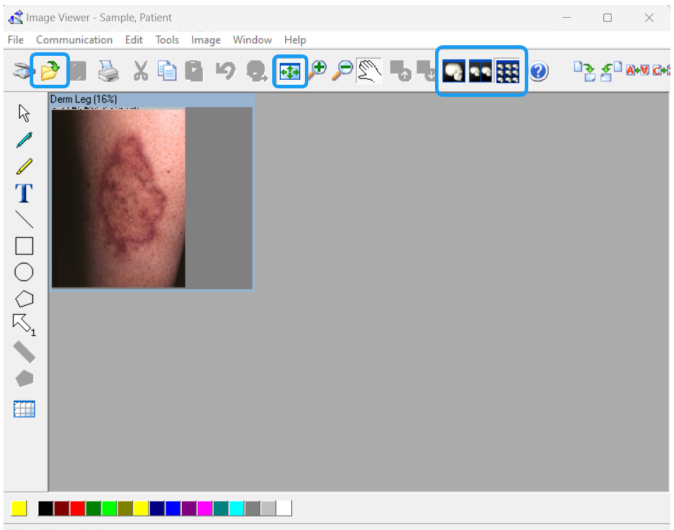
Step 5. Open a Sample Document *(Fixed Tile Mode)*

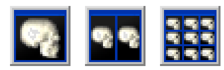
Open the “Derm Leg” image.

1. Click on the “Derm Leg” entry to select it.
2. Click on the **Document** menu.
3. Click **Open**. This will start the **Second Opinion Image Viewer** and display the picture. Notice that the current folder name (“Sample, Patient”) appears in the Image Viewer’s title bar and the picture’s name (“Derm Leg”) appears in the picture’s title bar.

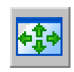
Using your mouse you can also **Right Click** on the document, then click **Open**.

Double-clicking a document also opens it up.





Click on the **View Entire Image**, **Tile 2x1**, and **Tile Multiple** buttons to see the effect on the **Image Viewer**.



The **Fit to Window** button re-sizes each of the displayed images so that no matter where the auto-tiling pattern is set you can see the entire image on the screen.

The **Second Opinion Image Viewer** has two modes of operation, **Fixed-Tiling** and **Free Form Tiling**. The fixed-tiling mode, which is displayed above, automatically tiles images, as they are loaded. This is very helpful when viewing a large number of images at one time. The fixed-tiling pattern can be set to 1x1, 2x2, all the way up to 5x5.

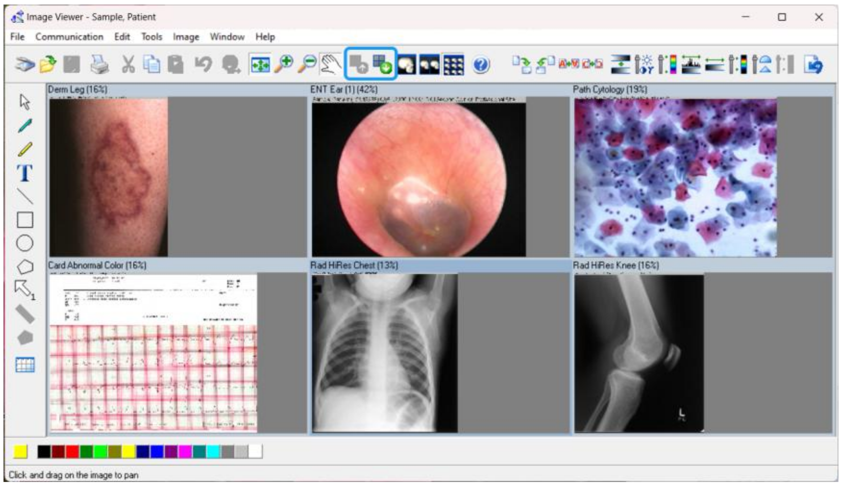
You can also click on the **Open** button to bring **Document Manager** forward.

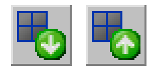
Open additional documents to view fixed-tiling in action.

1. In the **Image Viewer** click on the **File** menu.
2. Click **Open…** This will cause **Document Manager** to come forward.
3. Double-click on the “**Rad HiRes Knee**” image to open.

Go ahead and open a few more images of your choice.

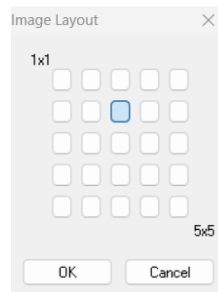
1. In the **Image Viewer,** click on the **File** menu.
2. Click **Open.** This will cause **Document Manager** to come forward.
3. Double-click on the image of your choice to select and open.



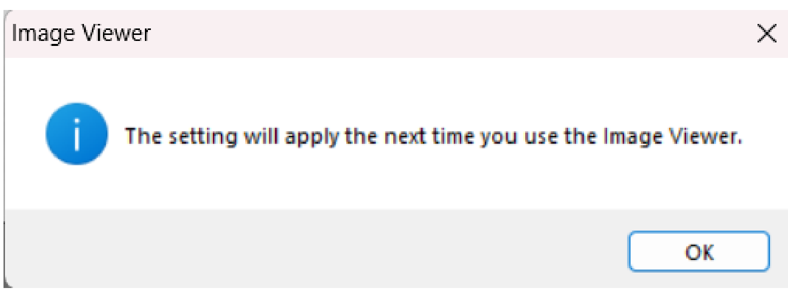


Click on the **Next Tile Set** and **Previous Tile Set** buttons to quickly page through all of the open images.

Open the **Window** menu and click **Image Layout** to change the auto-tiling setting.



To switch the **Second Opinion Image Viewer** to the free-tiling mode, open the **Window** menu and click **Fixed Tile Mode** to uncheck the menu choice. The following message will be displayed.



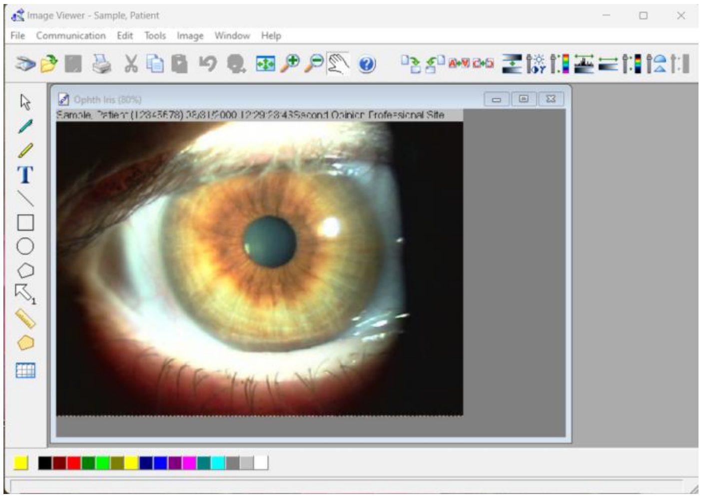
4. Click on the **Close** button on the **Image Viewer's** Title Bar.

Close button

Step 6. Open a Sample Document *(Free Tile Mode)*

1. Double-click on the "**Ophth Iris**" image.

This will start the **Second Opinion Image Viewer** and display the picture.



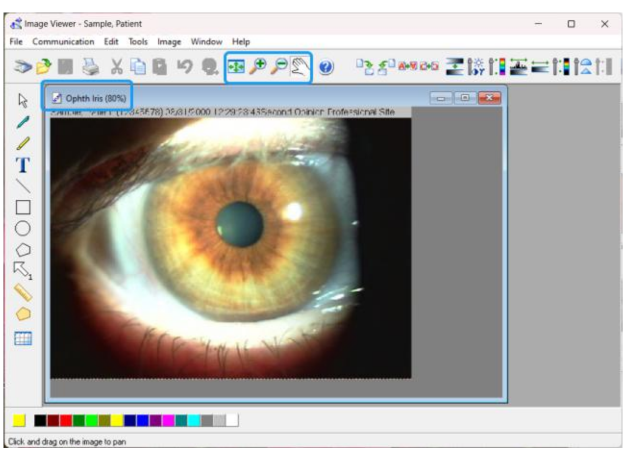
Step 7. Working with the Image

If the image contains an area or detail that you wish to examine more closely, you can zoom in to that area. If the image is larger than what you can see at one time on the screen, you can zoom out to see more of the image.

Zoom In

You can zoom into a picture in order to better examine it.

1. Click on the **Image** menu.
2. Click **Zoom In**. The picture is now enlarged. Notice that the current zoom factor is displayed in the picture's title bar.



You can repeat this process to further enlarge the picture up to one thousand percent (1000%).

You can also click on the **Zoom In** button on the **Annotation** toolbar or press the plus (+) key on the keyboard.

Move Image Parts into View

When the entire image is not visible in the available screen area, you can move the image to show hidden parts.

You can also click on the **Pan** tool in the **Annotation** toolbar.

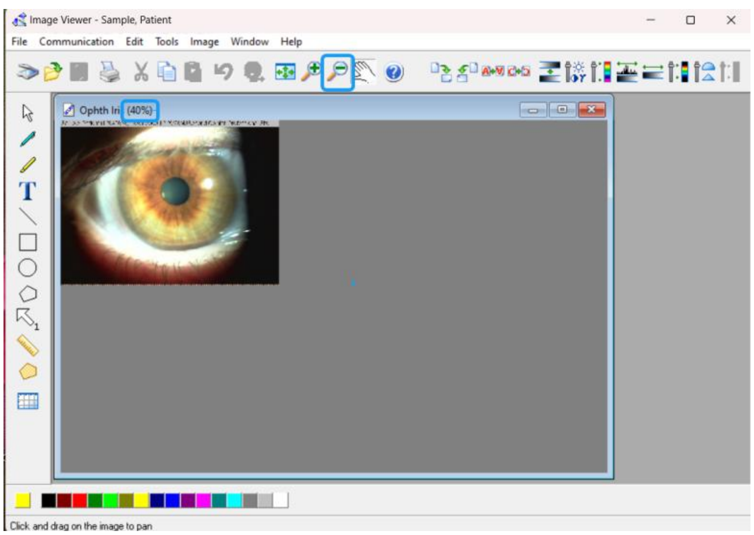
1. Click on the **Tools** menu.
2. Click on the **Pan** command to select that tool.
3. Position the mouse pointer over the center of the image. Notice that it changes shape to represent a hand.
4. Press the left mouse button and hold it as you drag the mouse to a different location. As you do, the image moves with it.
5. When the desired image portion is in view, release the mouse button.

Zoom Out

You can also decrease the size of the image. This is especially useful if an image is too large to fit entirely on the screen.

You can also click on the **Zoom Out** button on the Annotation toolbar or press the minus (–) key on the keyboard.

1. Click on the **Image** menu.
2. Click **Zoom Out**.



You can repeat this process to reduce the size of the picture down to twenty percent (20%).

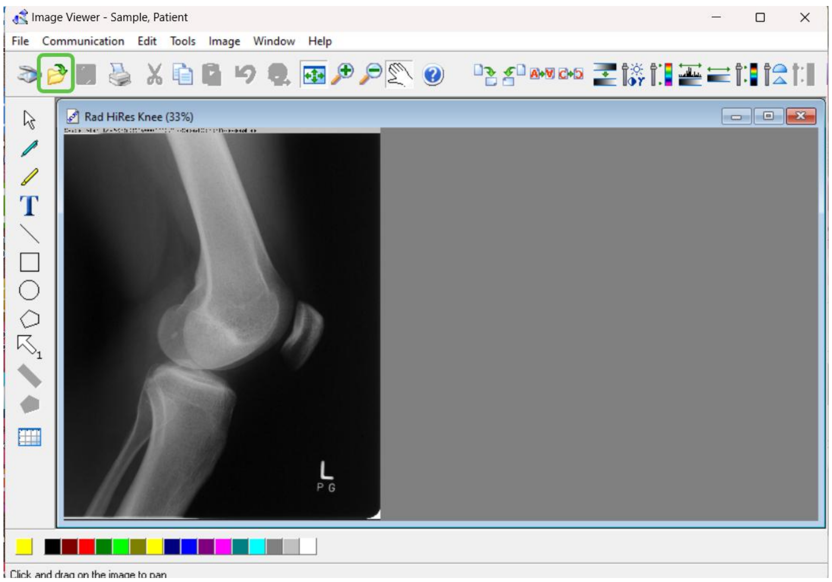
3. Restore the image to 100% by zooming in.

Step 8. Open Additional Documents

You can open additional documents to view at the same time.

1. In the **Image Viewer** click on the **File** menu.
2. Click **Open.** This will cause Document Manager to come forward.
3. Double-click on the “**Rad HiRes Knee**” image to select it and open it.

You can also click on the **Open** button to bring **Document Manager** forward.

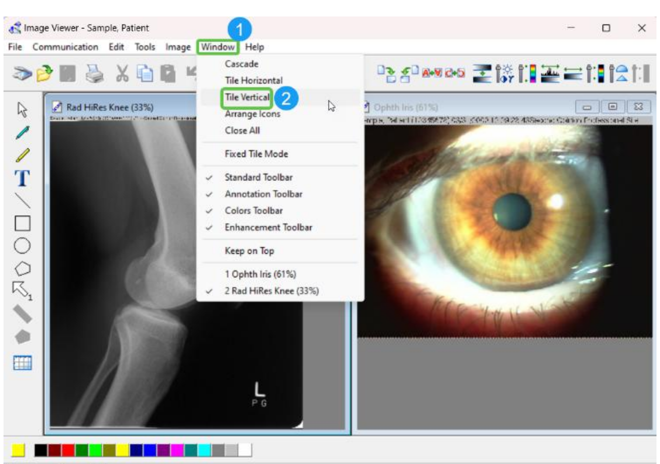


The knee x-ray image is also opened in the Image Viewer and appears on top of the iris image.

Step 9. Tile Images

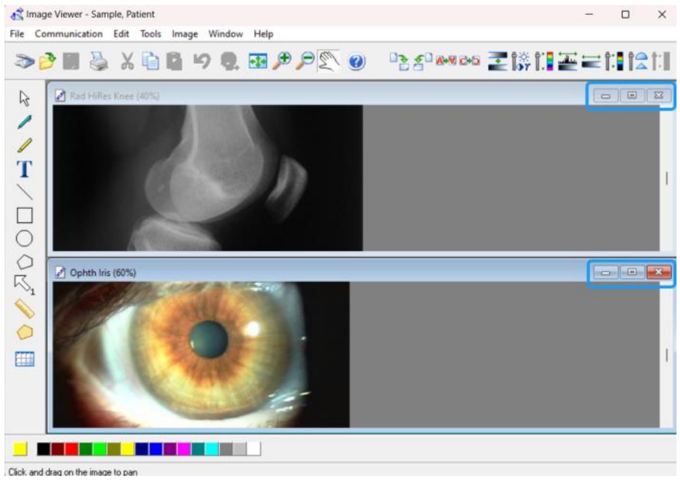
You can tile all the open documents to see them at the same time.

1. In the **Image Viewer**, click on the **Window** menu.
2. Click **Tile Vertical**.



All of the open documents are arranged to fit on the screen.

1. In the **Image Viewer**, click on the **Window** menu.
2. Click **Tile Horizontal**.



Step 10. View an Image Full Size

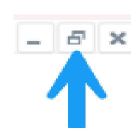
Viewing an image full size hides all the other images behind it and allows the maximum viewable area for that image.

- To view the image of the eye full size, click once on the **Maximize** button located on the image's Title Bar (not the application's Title Bar).

Maximize button

The image will now be displayed at the full size of the work area. You can then restore it back to its original size.

- Click on the **Restore** button located on the right of the Menu Bar. The top row of buttons is for the entire application, while the second row applies to the image.



Restore button

The image will now be returned to its original location and size.

Step 11. Close the Images

When you are done working with an image you can close it.

1. Click on the **Close** button for the image.
2. Repeat the process for the other open image(s).

Close button

Step 12. Close the Image Viewer

When you are done working with images, you can close the **Image Viewer**.

- Click on the **Close** button on the **Image Viewer's** Title Bar.

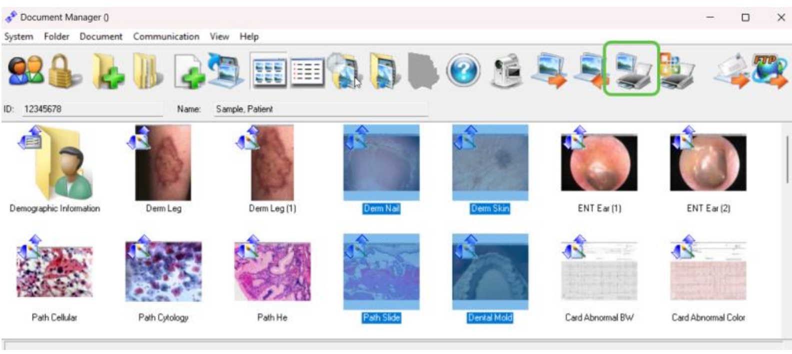
Close button

Step 13. Printing Images

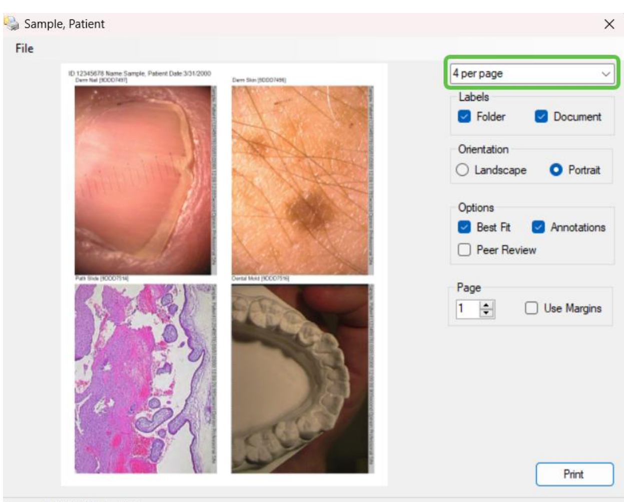
The are a variety of different way to print images from within **Second Opinion**. You can print images directly to a printer one at a time using the print functions within the **Image Viewer.** You can print images to a **WordReport**, which is helpful if you want to associate text with an image or images. You can also create a **PowerPoint** presentation and print the images as slides from there. Lastly, you can use the **Image Print Manger**. The **Image Print Manager** is a very powerful tool to help you print images directly to a printer with a variety of options and settings.

For this lesson we will go over the functionality of the **Image Print Manager**.

1. From the **Document List** area of **Document Manger** select four documents.
2. Click on the **Image Print Manager** on the Standard Toolbar



3. The printer preview window will appear. Click the **4 Image per page** from the dropdown list. From here, you can fine tune your printout by choosing additional options. Click on any of the other options and see how the preview changes. The window shows exactly what will print on the printer. Click **Print**.



It does not matter which view is active (**Large Icon** or **Details** view) when images are selected. Images can be selected in a variety of ways. You can use your mouse; left click your mouse and draw a square. All of the images the square touches will be selected.

Standard Windows selection conventions are also supported, like clicking on the first image and with the shift key down click on the last item. This will select the entire range, or with the CTRL key down, you can individually click the left mouse button selecting or deselecting images.

4 images per page with Best Fit selected.

Step 14. Log out of Second Opinion

When you are done working with **Second Opinion**, you can either exit the program or log out. To log out, click **Logout** from the **System** menu.

You can also click on the **Logout** button.

Conclusion

You have completed the first lesson and have learned to do the following tasks:

- Log into **Second Opinion**
- Open a folder using **Folder**, **Locate Folder**
- View document information using **Document**, **Information**
- Open documents to view using **Document**, **Open Selected**
- Use the **Image Viewer** in both Fixed and Free Tile modes.
- Zoom in and out of images using **Tools**, **Zoom In**/**Out**
- Tile images using **Window**, **Tile Horizontal**/**Vertical**
- View an image full size using the Maximize button
- Close images and the **Image Viewer**
- Print images with **Image Print Manager**
- Log out of **Second Opinion**

Lesson 2

Working with Folders

Folders allow Second Opinion to organize documents.

In this lesson you will create a new folder using the patient demographic information form that ships with the program.

Step 1. Create a New Folder

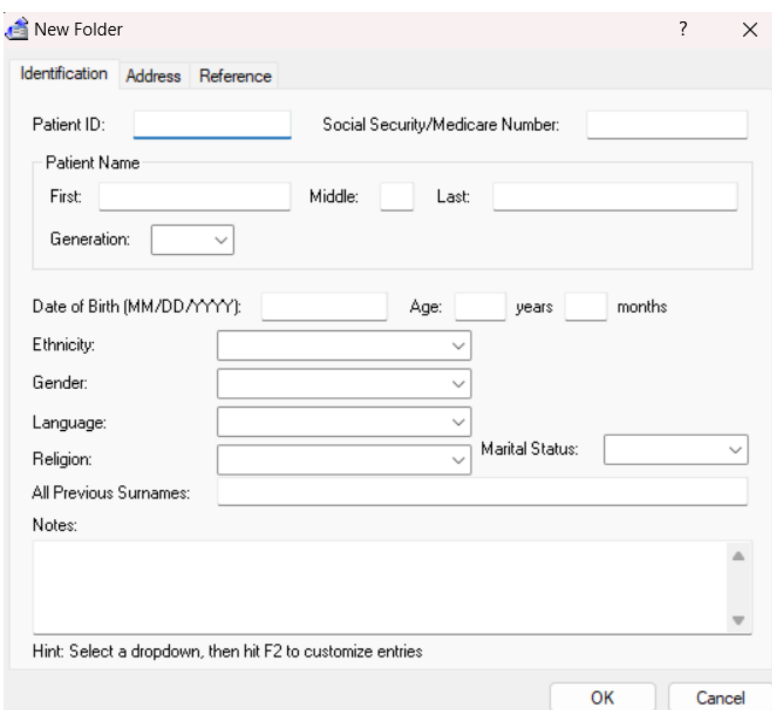
All documents need to be stored in a folder. You can create a new patient folder and enter demographic data about that patient.

Start a New Demographics Form

See Lesson 1 Step 2 in this tutorial for a refresher.

1. Start **Second Opinion**, if necessary, and log in with a Login Name of "**SOSAMPLE**" and a Password of "**1234**". Again, if your system administrator has removed or altered that account, use a different account.
2. If the **Locate Folder** window appears, click the **Close** button.
3. Click on the **Folder** menu.
4. Click **New Folder…** This will start the **Patient Demographics Information form**.

You can also click on the **New Folder** button.



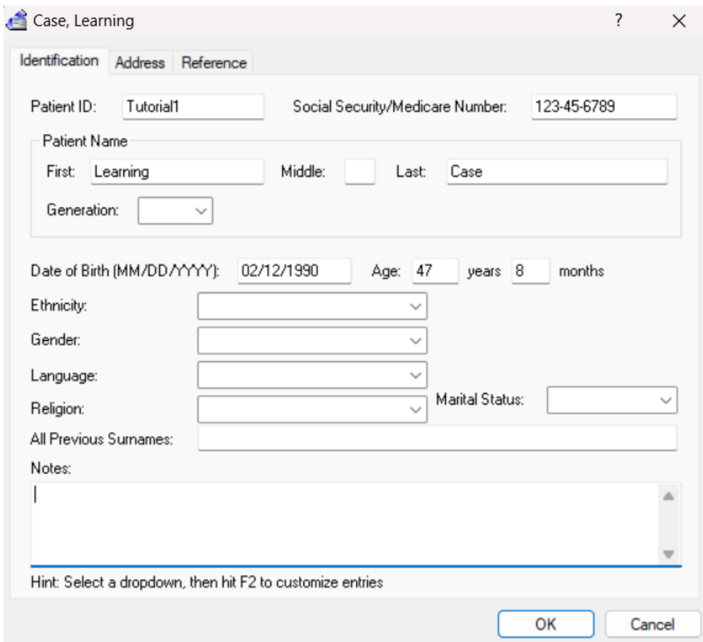
Fill In the Demographics Form

Across the top of the Demographics Information window there are three tabs: **Identification**, **Address**, and **Reference**.

1. In the **Identification** page, enter a **Patient ID** of “Tutorial1” (you can enter up to 25 characters in the Patient ID). Press the Tab key to go to the next field.
2. Enter a **Social Security Number** of “123-45-6789”. Notice that the dashes automatically appear in the correct places. Press the Tab key to go to the next field.
3. Enter all four digits of the year in **Date of Birth** field and that the age is automatically calculated when you exit that field.
4. Enter the rest of the information as indicated below.

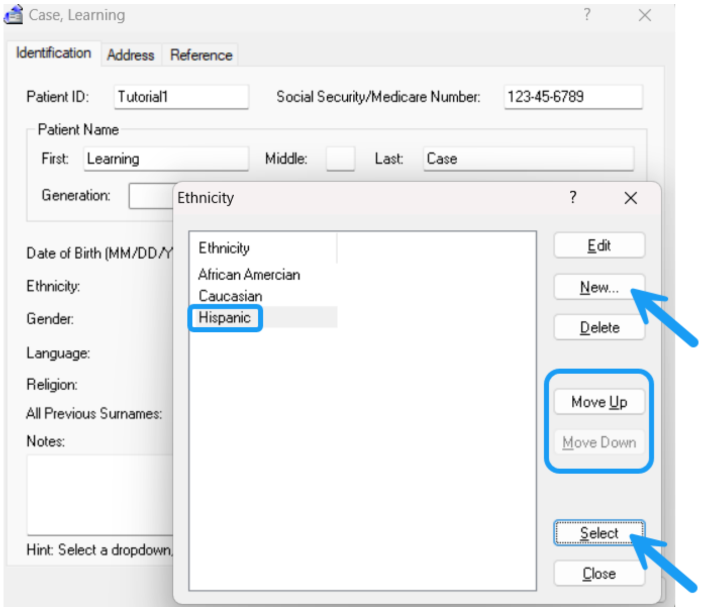
The mask in the Social Security Number can be changed in the Settings.ini file located in the **Second Opinion** program directory.

When you get to the **Ethnicity** field, proceed to the next step.



The **Patient ID** (Folder ID) and **Name** fields (Folder Description) are the only mandatory fields when creating a new folder. All of the other fields can be ignored or entered at a later date.

5. The contents of most lists in **Second Opinion** can be customized. To customize the contents of the **Ethnicity** and all other drop-down lists, place the cursor anywhere in that field and press F2.

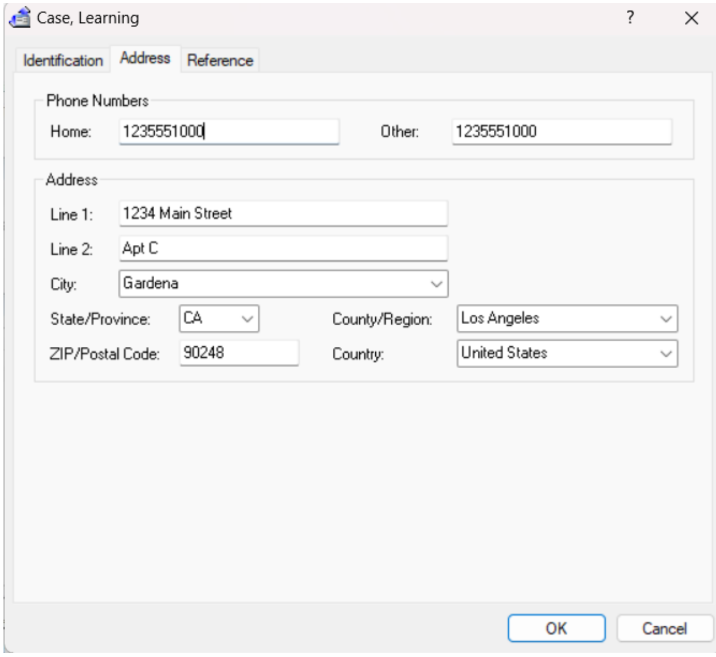


6. You can add, edit, or remove entries from the list. You can customize all values for each lookup field in this form. Enter the values displayed above, then select an entry and click **Select**.

7. Complete the remaining values on this screen and be sure to practice customizing the lookup fields.

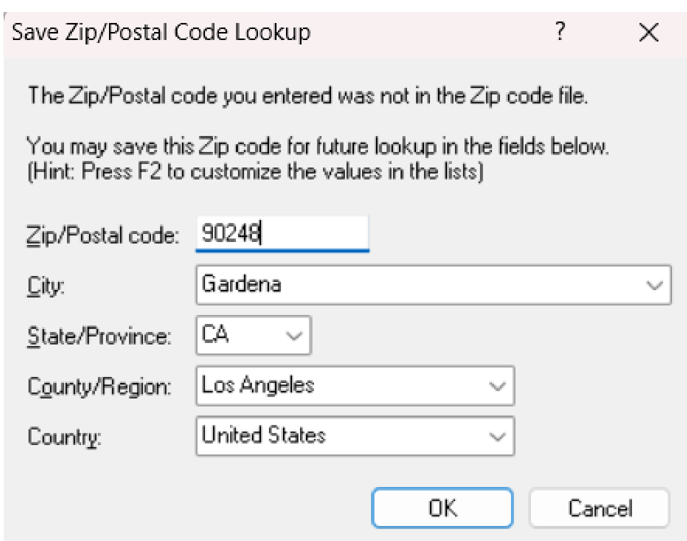
The look up values are inserted into the list in alphabetical order. You can use the **Move Up** or **Move Down** buttons to re-order the list. This allows you to move the most often used values toward the top of the list. These values remain in the lookup database for future use.

8. Click on the **Address** tab and enter additional information as indicated below. After you fill in the **Line 2** field, proceed to the next step.



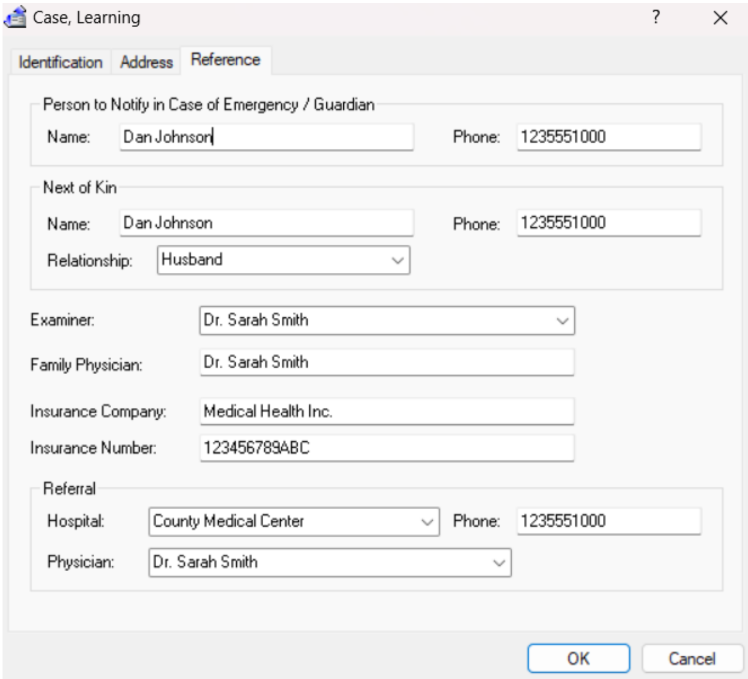
9. When you press Tab while in the **Line 2** field, the focus goes to the **Zip/Postal Code** field and not the **City** field. When you enter a value in the **ZIP/Postal Code** field, the system will look for a matching value in the database to use to automatically fill in the **City**, **State/Province**, **County/Region** and **Country** fields.

   If the ZIP code is not found, the **Save Zip/Postal Code Lookup** window will appear. Fill in the fields as follows:

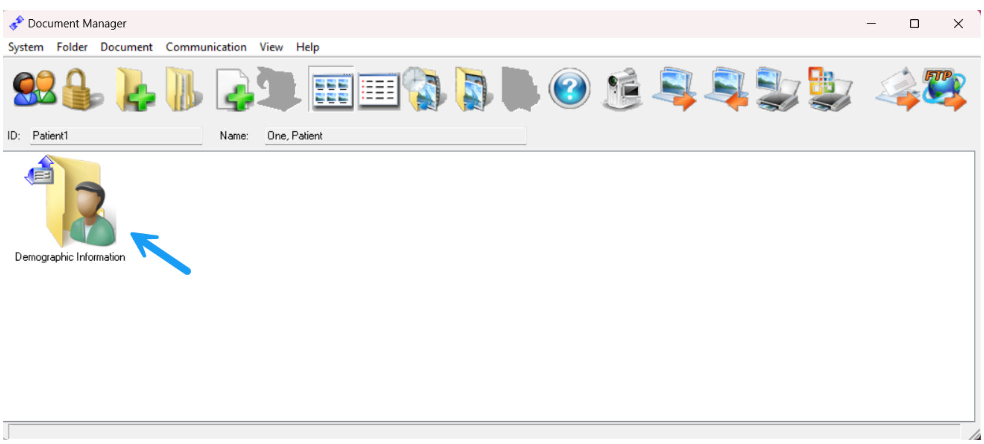


10. Click **OK** in the **Save Zip/Postal Code Lookup**. Notice that the **City**, **State/Province**, **County/Region** and **Country** fields are automatically filled in.

11. Click on the **Reference** tab and fill it in as follows:



12. Click **OK** to close the dialog box and save the entries. The new patient becomes the active patient in **Document Manager** and a “Demographic Information” document entry is created for the form you just filled in.

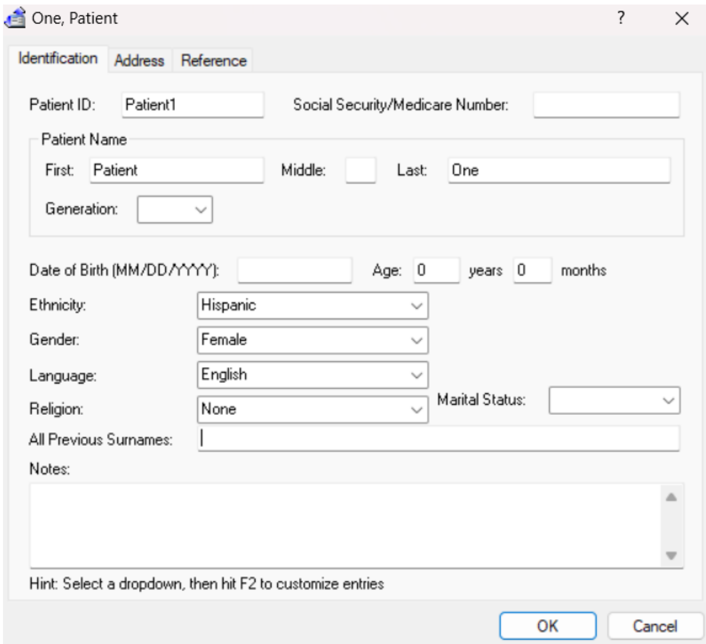


Step 2. View and Edit Folder Information

You can view and edit the folder information at any time.

View Demographic Information

Double-click on the “Demographic Information” document. The Demographics Information Form appears with the patient information.

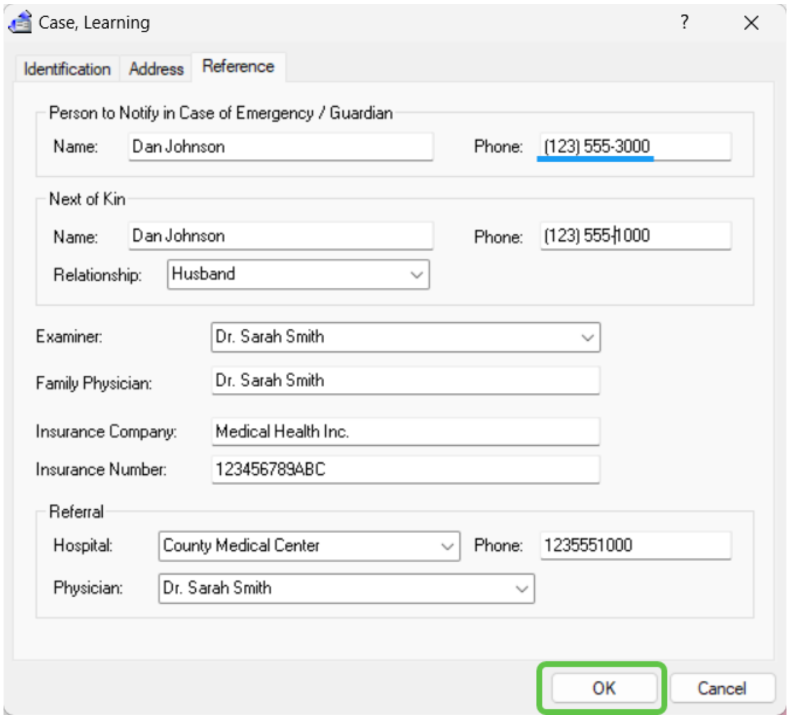


In the future, if you open a Demographics Information form and all of the fields are grayed out and you are unable to edit the information this means either you do not have the security privilege to edit the data or the folder was not created at your facility and belongs to another site.

Edit Patient Information

If your site created the folder, you can edit the Demographic Information. Only the system administrator can edit the **Patient Id** once the folder has been created.

1. Click on the **Address** tab and click in the **Other Phone Number** field
2. Replace the entry with “**(123) 555-3000.**”



3. Click **OK** to save the changes.

The patient information is now updated with the new information.

Conclusion

You have completed this lesson and have learned to do the following tasks:

- Create patient folders using **Folder**, **New Folder**
- View folder information by opening the Demographics Information form
- Edit folder information

Lesson 3

Digital Camera

Second Opinion makes it easy to get images from digital cameras and add them to a folder. You can do this in a variety of different ways. You can connect the camera to the computer after the fact and retrieve the images via a TWIAN or WIA interface, you can remove the memory card from the camera and manually import the items, or you can use a Wireless File Transfer adapter like an Eye-Fi SD memory card and wirelessly retrieve the photos and videos as they are being captured and have them automatically saved into the current folder.

If you plan on connecting the camera to the computer to retrieve the items from your digital camera via a TWAIN or WIA interface, please refer to Lesson 4, Scanning Images for the steps to do this.

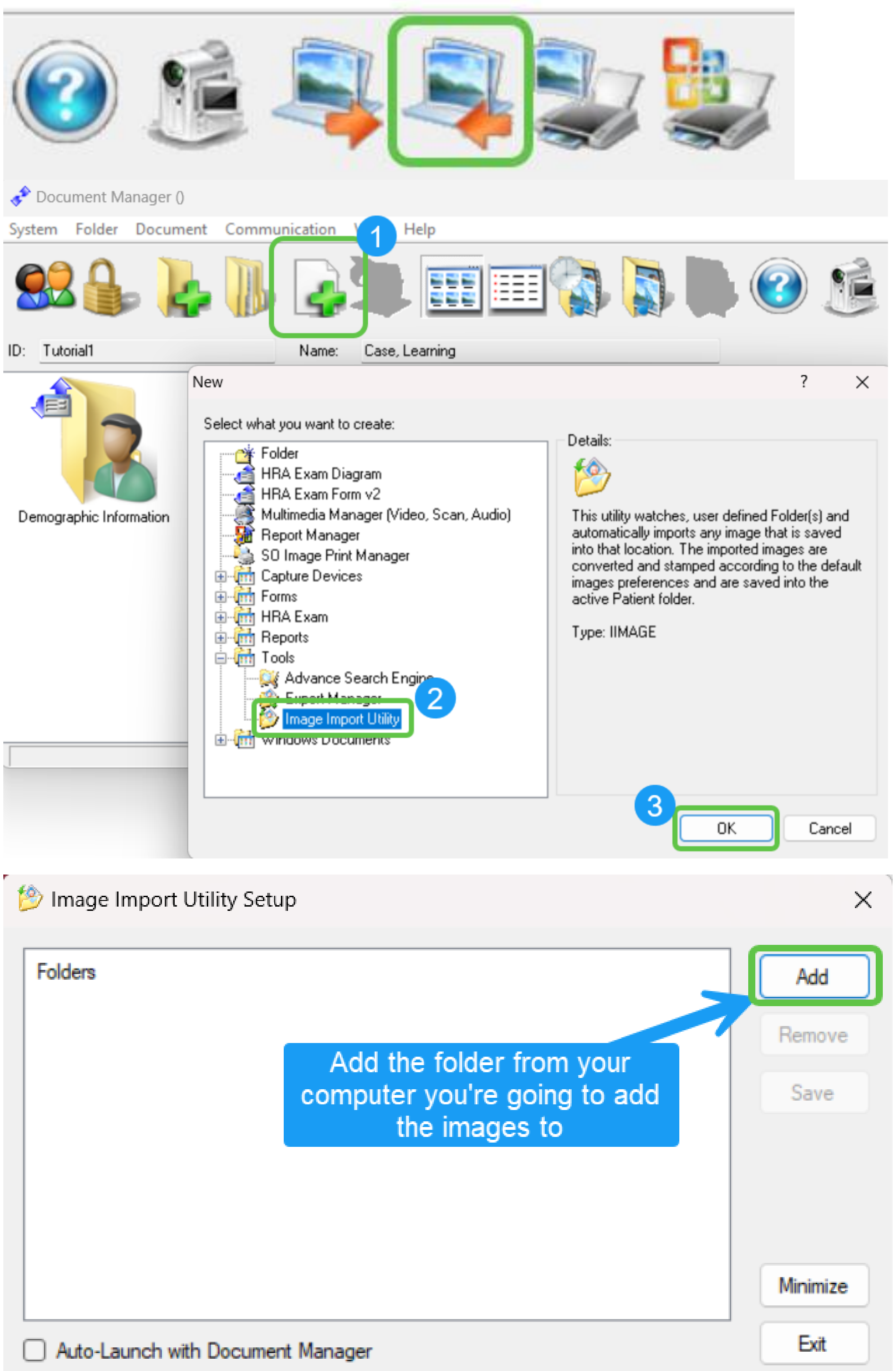
In this lesson we will cover connecting the camera to the computer via an Eye-Fi wireless adapter and removing the memory card from the camera and manually importing the items.

To complete this lesson, you need to have a digital camera and the Second Opinion Image Import Manager setup monitoring a particular folder on the computer. If you are unfamiliar with this utility please refer to the Image Import Manager instruction sheet. It will walk you through setting up the environment to successfully import images from a digital camera. If you will be using an Eye-Fi adapter and it is not yet setup and configured, please refer to the Configure the Eye-Fi Card instruction sheet for step by step instructions.

Using the Image Import Manager utility simplifies the process of importing items into the current folder. Just about any photo, video or document that is saved into a monitored folder will be automatically processed and saved in the current patient folder. Photos are stamped with patient’s identifiers and saved in the file format specified in the Image settings section of the program. MultiMedia Manager can also be used to do this. Any image or video clip can be “dragged and dropped” in the MultiMedia Manager preview window, once there they can individually inspected for content, named and saved. If you want to import photos into a folder without processing them, you can simply drag and drop the photos or any other document type into the main Document Manager folder window.

Before You Begin – Activate Image Import Manager

To start the application, **Click** on the **Image Import Utility** tool bar button or **Click** the **New Document** button, expand the **Tools** section and **Click** on **Import Image Utility**. Once active, **Click** **Minimize**.



Step 1. Select a Folder

Make sure you have the correct patient folder open for the images and video clips to me be saved into. If you are not sure how to do this, refer back to Lesson 1.

Step 2. Start Taking Pictures

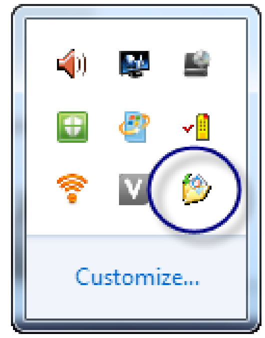
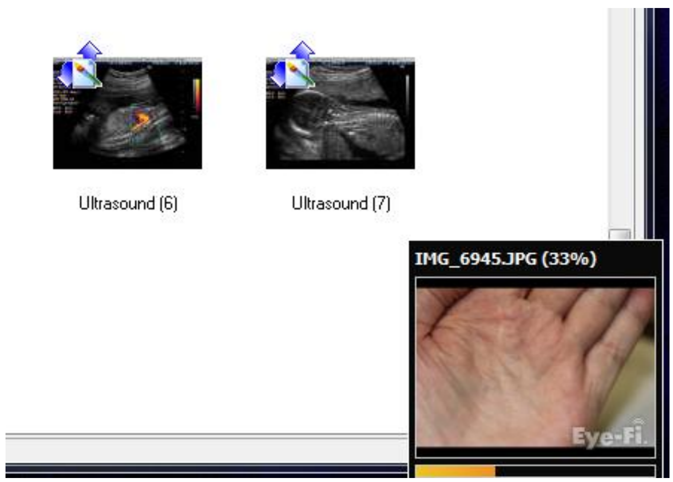


Image Import Manager active status icon.

Turn on the digital camera with the Eye-Fi SD adapter card installed and start taking pictures. Sometimes it takes from 30 seconds to a couple of minutes for the Eye-Fi wireless file transfer adapter to activate. Once active, any JPEG or RAW format photo or video clip already stored on the memory card, will start transferring to the computer. The items are transferred to a folder being monitored by the import utility. Once transferred, the import utility will process and save the item into the current patient folder.



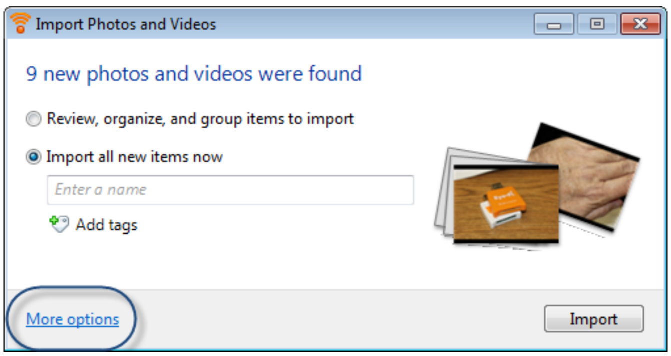
Verify the items and edit the description if necessary. To edit the description, **Right Click** the item and **Click** **Information** on the pop-up menu.

Step 3. Manually Import Images

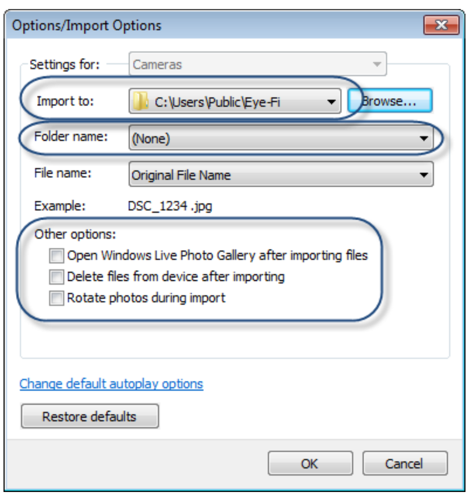
If you are using an Eye-Fi card and the images do not automatically transfer during use or if you are using a standard digital camera memory card and you want to manually import the items, here are the how-to steps.

Before you continue, make sure the Second Opinion Image Import Manager utility is running.

1. Remove the memory card from the camera and plug it into a memory card reader connected to your computer. When the computer recognizes that the card is from a digital camera or that it contains multimedia content on it, the **Import Photos and Videos** Wizard included with Windows will appear.



2. **Click More options** to validate the settings for the utility.



Verify the **Import to:** file location. Make sure it points to a Folder being monitored by the Image Import Manager utility, and make sure the **Folder name:** is set to (None). Lastly, make sure nothing is selected in the **Other options:** section. **Click OK** and continue the import process. Just like using the Eye-Fi card, the items will be transferred to a monitored file location, processed, saved into the current Patient Folder and deleted.

Conclusion

You have completed this lesson and have learned to do the following tasks:

- How to activate Image Import Manager
- Automatically receive photos and video from a digital camera using an Eye-Fi wireless files transfer adapter card
- Manually import multimedia content from a memory card

Lesson 4

Scanning Images

Second Opinion makes it easy to bring images in from a variety of scanners (TWAIN devices) and add them to a folder. Examples of scanners include flatbed, film, slide, print, drum, handheld, and some digital still and video cameras.

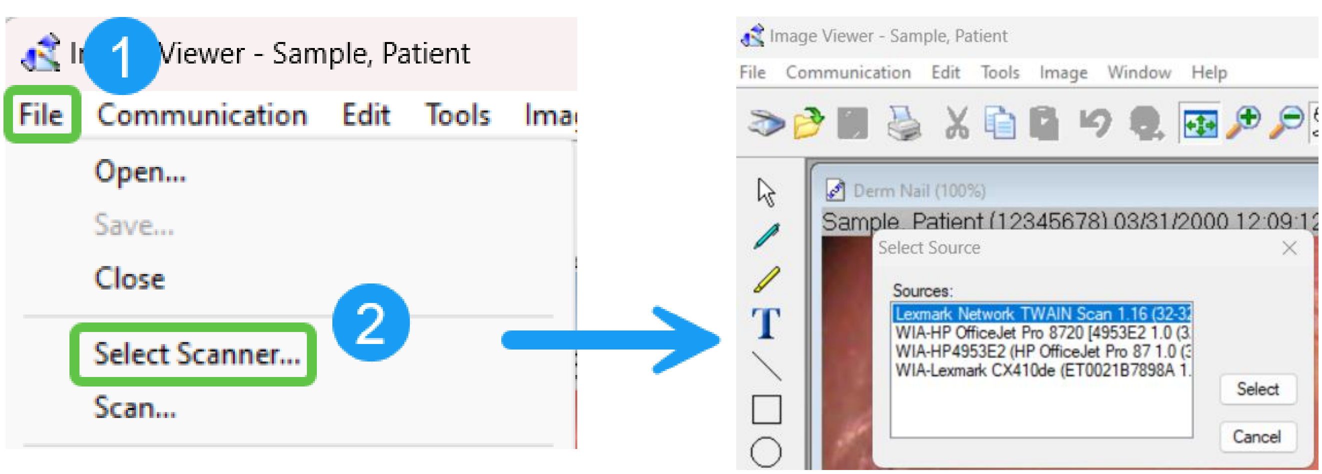
To complete this lesson, you need to have a scanner of some type installed on your computer and the scanner's TWAIN software drivers loaded. See the documentation that came with your scanner for installation instructions.

In this lesson we will select a scanner, scan an image, and save it to a patient folder. For this lesson, we will use the Scan Images tool inside of Multimedia Manager.

If you run into problems during this lesson with your scanner / imaging device, it may not be fully supported in **Scan Images (Legacy)**. Try using **MultiMedia Manager**. See **Learning To Use MultiMedia Manger**.

Before You Begin – Select a Scanner

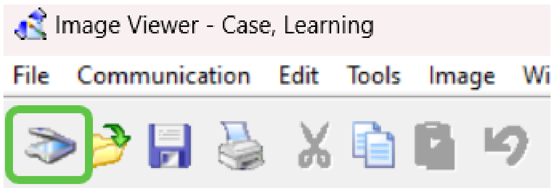
If you are not sure whether or not you have selected a TWAIN device, you need to do so. To do this, you need to open up a different folder that contains at least one image and open up an image. With the **Image Viewer** open, click on **File**, then click **Select Scanner…**, lastly select the source you want to use.



Step 1. Scan an Image

Once a scanner has been selected, you can scan one or more images into the folder.

1. Keep the image viewer open **and click on the Scan Icon**. This will launch your scanner application. Please consult the documentation that came with your scanner for instructions on using and configuring it.



The exact steps you take to preview or scan an image depend entirely on the type of scanner you have. Some software, such as that for digital still cameras, will allow you to choose more than one image to be transferred at the same time.

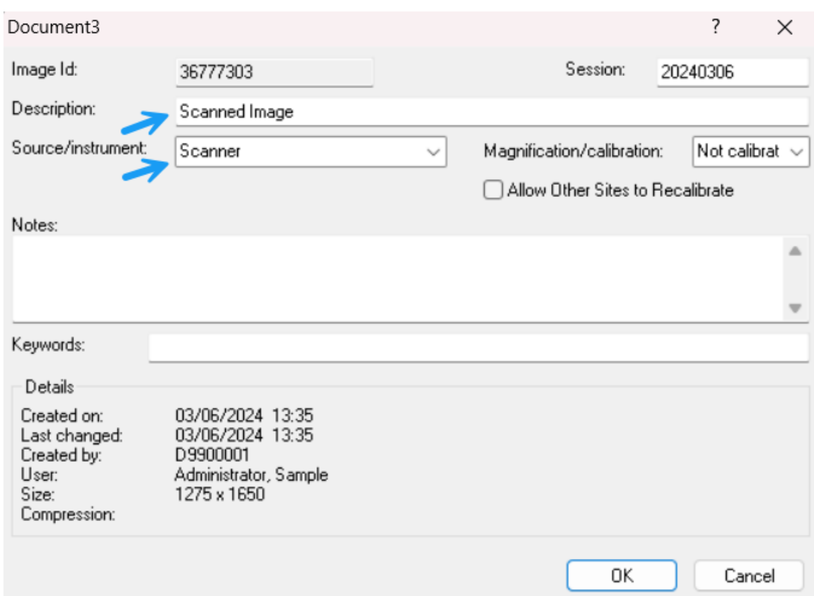
2. Make any necessary selections and adjustments in the scanner software and click the appropriate button in that software to accept the image and transfer it to the **Image Viewer** (the button may be called **Capture**, **Scan**, **OK**, **Final**, etc.).

Step 2. Save Scanned Images

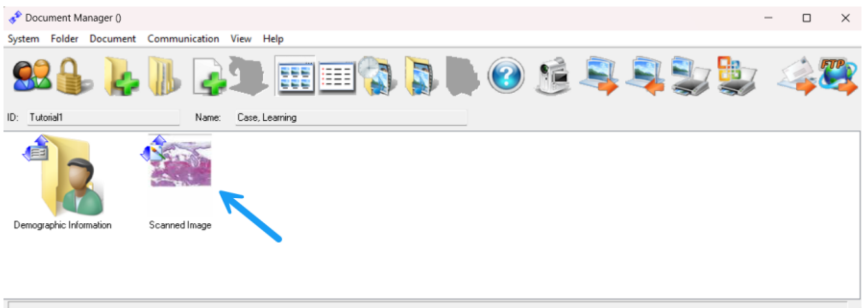
After you have scanned your images, you can save them in the folder. If you do not save the images, **Second Opinion** will ask you if you want to save them before closing the folder.

1. In the **Image Viewer**, open the **File** menu and click **Save**.

You can also click on the **Save** button on the toolbar.



2. In the **Description** field, type "**Scanned Image**". Descriptions can be up 30 characters long and can contain spaces. The **Session** field defaults to the current date; it can be changed at this time. Sessions can be up to 35 long and can contain spaces.
3. In the **Source** field, select the type of device that originally generated the picture. To add additional **Instrument sources**, go to the **Document Manager** window, select **System**, **Preferences…**, then click the **Instruments** tab.
4. Type any notes you want in the **Notes** field. Notes can contain multiple lines of text.
5. Click the **OK** button. The image will be saved into the current folder.



Step 3. Scan Additional Images

While you are in the Image Viewer, you can scan additional images.

1. Select **File**, **Scan**.
2. The scanner's software will run to allow you to scan one or more images.
3. You may now scan a new picture or cancel the scan.
4. Finally, exit the Image Viewer by clicking on the Close button.

You can also click on the **Scan** button.

Conclusion

You have completed this lesson and have learned to do the following tasks:

- Select a Scanner/TWAIN device
- Scan one or more images into a folder using **Document**, **New Document**, **Scan images (Legacy)**
- Scan additional images while in the Image View using **File**, **Scan…**
- Save a document into the folder using **Document**, **Save.**

Lesson 5

Capturing Images From Video

The MultiMedia Manager allows you to capture still images or digital video clips from a variety of multimedia devices; USB camera, video camera connected to a capture device or an other imaging device connected to the computer.

To complete this lesson, you will need to have a working video imaging device. See the documentation that came with your video capture card for installation and configuration instructions.

Note: MultiMedia Manager supports devices with DirectShow, WDM and TWAIN drivers.

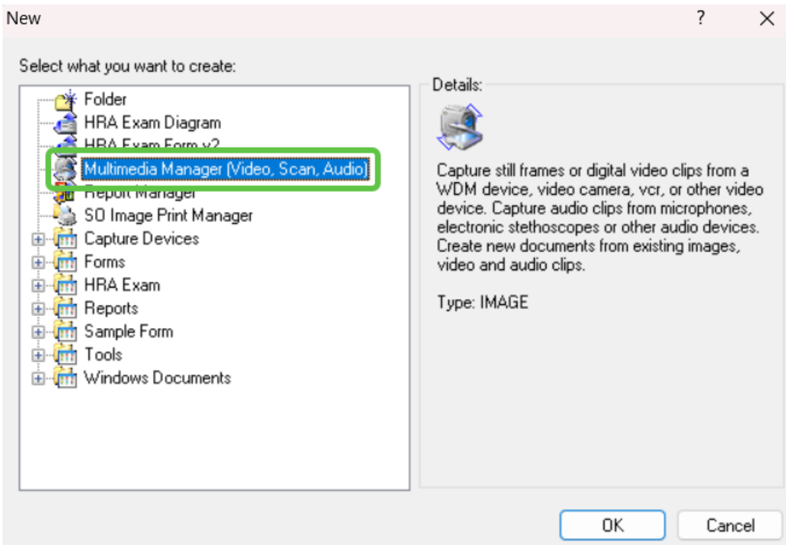
In this lesson you will learn to capture several still frames and video clips from a video source with the MultiMedia Manager add-in.

Step 1. Start the Video Capture Add-In in MultiMedia Manager

1. Turn on your video source.

You can also click on the **New Document** button.

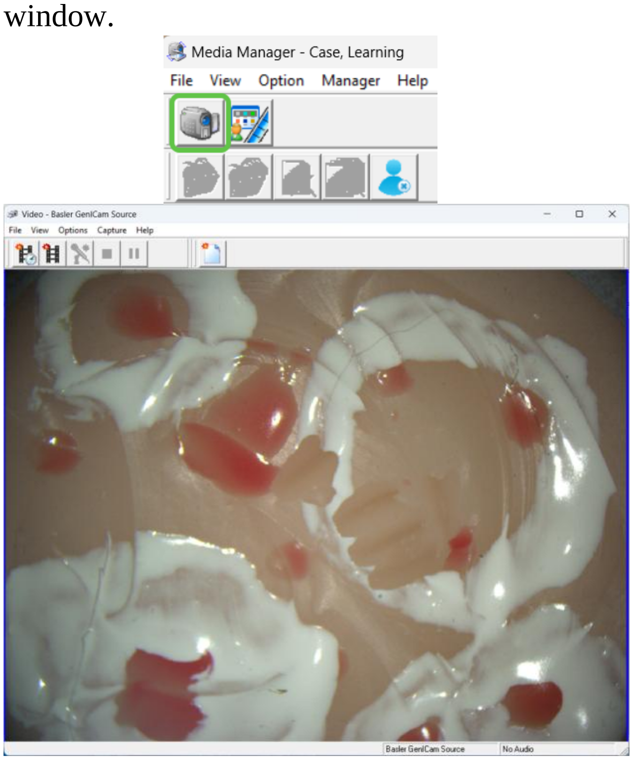
2. From **Document Manager**, open the **Document** menu and click **New Document…**



Clicking the **Launch Video Capture** icon on the main tool bar will Launch the MultiMedia Manager program and automatically start the video capture window.

3. Choose the "**Multimedia Manager (Video, Scan, Audio)**" entry.

4. Click **OK**. This will launch the Multimedia Manager. Start the video capture add-in. If your video source and device are set up correctly, you will see a preview of the video in the Video window.



Trouble Shooting Tip

If you get the message, **No Video Capture Device Found**, or a solid blue screen, click **Options, Video Device,** then select the device you are trying to use. If it is not listed, then either the device drivers are not properly installed, or the device is not supported.

If there is a problem with the video preview click **Options**, then **Video Source** and make sure the correct video input is selected.

If the video preview does not take up the entire preview window, click **Options**, then **Video Capture Size** to adjust the size.

Step 2. Capture a Still Frame

Click on the **Capture Still** button, hit the space bar, or tap your foot pedal to immediately capture the next frame. Each captured frame will appear in a list in the Media Manager Window.

Capture Still Button

Step 3. Capture a Digital Video Clip

Your video capture device must support video clip capture and must also be properly configured. If you do not have this capability, you may skip this step.

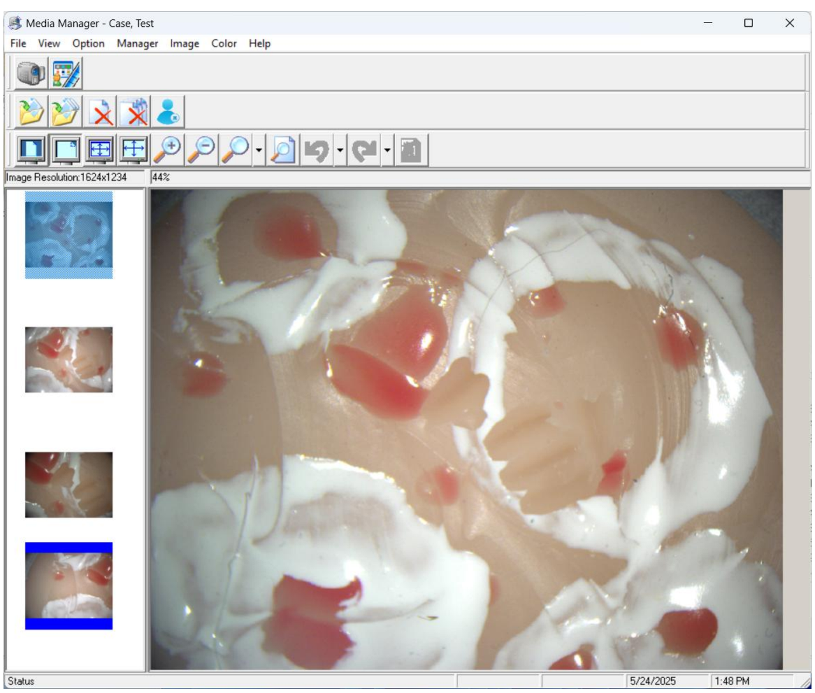
1. To begin recording, click on the **Capture Clip** button. The program will begin recording the video.
2. When you wish to stop recording, click **Stop Capture** or click the RIGHT mouse button.

To capture video clips of a specific length, click on the **Capture timed video clip** button. Each captured clip will appear in a list in the Media Manager Window.

Capture timed clip and capture video clip Button

Step 4. Review Captured Stills and Clips

When you’re finished capturing your video clips and images, close the video window and move to the Media Manager window with the captured media listed. Click on the desired still or clip and this will now be the focus.

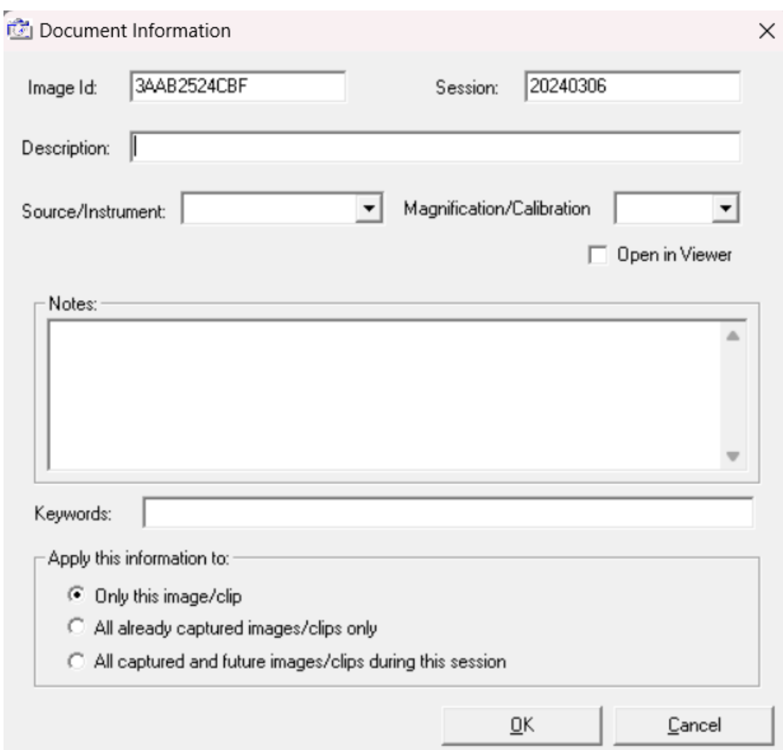


Step 5. Save Captured Stills and Clips

We will save the first captured still into the folder. If you do not save the captured items, they will be lost when you close the video capture application or if you change folders. **Second Opinion** will also ask you if you want to save them before closing.

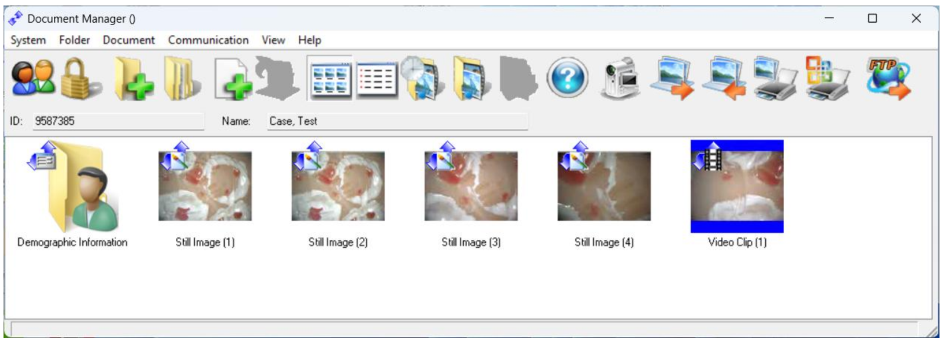
1. **Click on the first captured frame** in the list on the left side of the Media Manager.
2. If you would like to keep the media, click **Accept**. If you do not want to save the media, click **Discard**. Here are the options available:

When you accept the media, this screen will appear.



3. In the **Description** field, type in a description or leave “Still Frame”. Descriptions can be up to 30 characters long and can contain spaces. The **Session** field defaults to the current date; it can be changed at this time. Sessions can be up to 35 characters long and can contain spaces.

4. In the **Source/Instrument** field, select the type of device that originally generated the picture. To add additional Instrument sources go the **Document Manager** window, select **System**, **Preferences,** then click the **Instruments** tab.
5. Type any notes you want in the **Notes** field. Notes can contain multiple lines of text.
6. Click the **OK** button. The image will be saved into the current folder.



Conclusion

You have completed this lesson and have learned to do the following tasks:

- Capture still video frames using **Document**, **New Document**, **Multimedia Manager (Video, Scan, Audio)**
- Save a captured still video frame into the folder using **Accept**

Lesson 6

Adding a Referral Form to a Folder

In the previous lessons of this tutorial, you created a folder and added multimedia content to that folder. The last step in creating a complete case folder is adding clinically relevant information to the folder. This information should be relevant history, clinical information, and should include specific questions for the specialist. This is done by adding a **Referral Form** to the folder. After the specialist reviews the case, a **Consultation Form** will be created and sent back.

The **Referral** and **Consultation Forms**, included with the software, are generic forms and can be used in all medical specialties. Customized specialty-specific referral and consultation forms can be created and added to your **Second Opinion Professional** installation.

Another alternative is to create or use an existing paper based referral form, fill it out by hand, and scan it into the patient folder. Refer back to Lesson 3 Scanning Images in this tutorial for instructions on how to scan in a referral form.

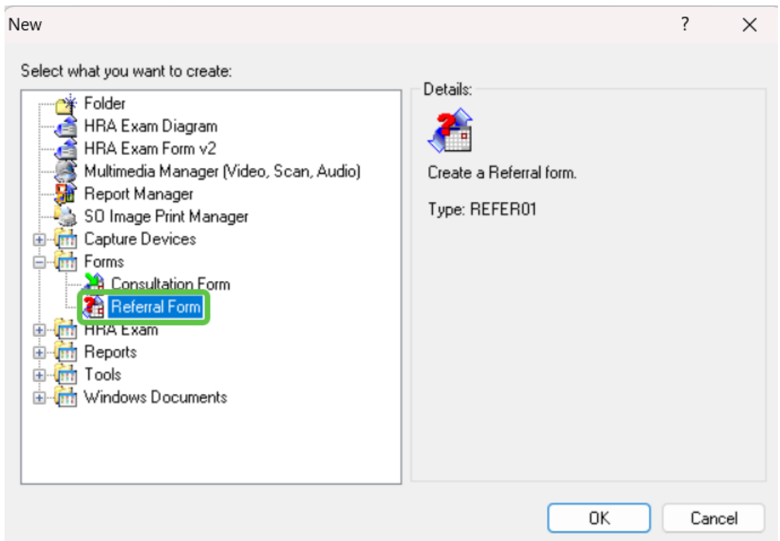
Step 1. Create a New Referral Form

All patient folders going out for a consultation by a specialist should contain a **Referral Form** document.

Start a New Referral Form

You can also click on the **New Document** button.

1. From **Document Manager**, open the **Document** menu and click **New Document…**

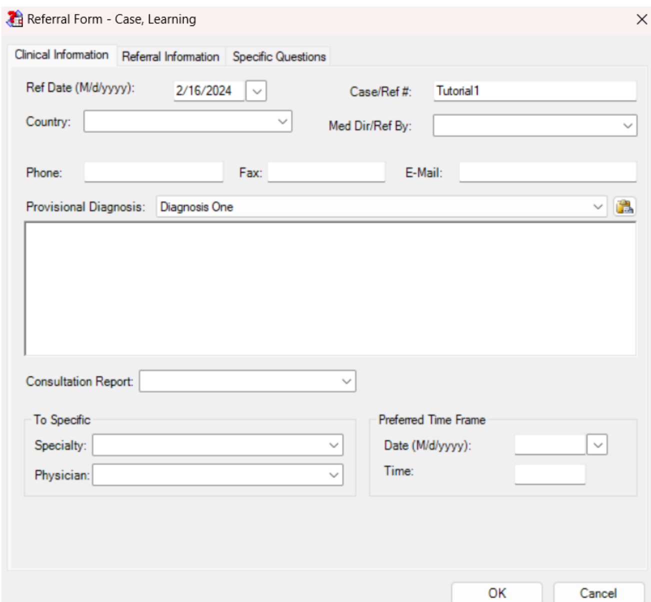


2. Choose the "**Referral Form**" entry in the **Form** section. Notice that a description of that entry appears in the Details section on the right.
3. Click **OK**. This will launch the "**Referral Form**" add-in.

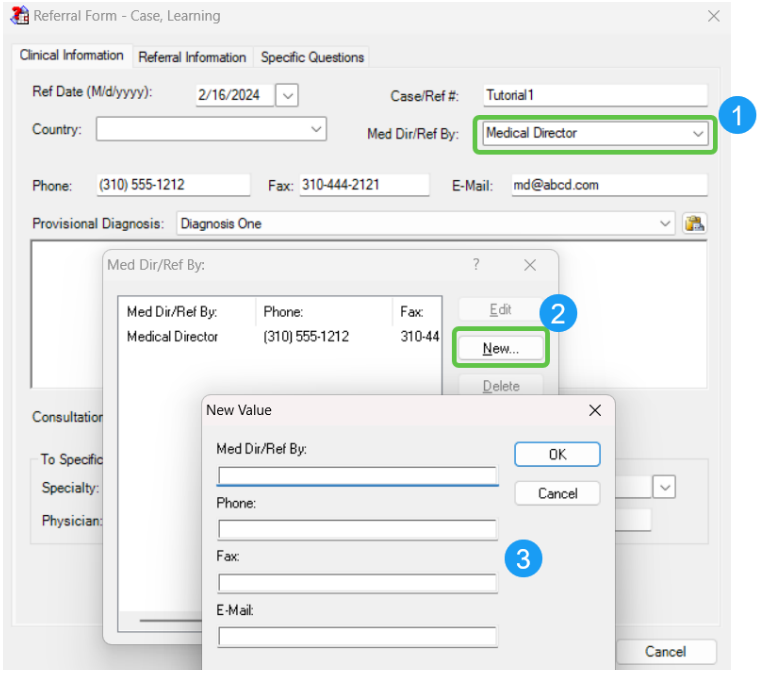
Fill In the Referral Form

Across the top of the Referral Form window there are three tabs: **Clinical Information**, **Referral Information**, and **Specific Questions**.

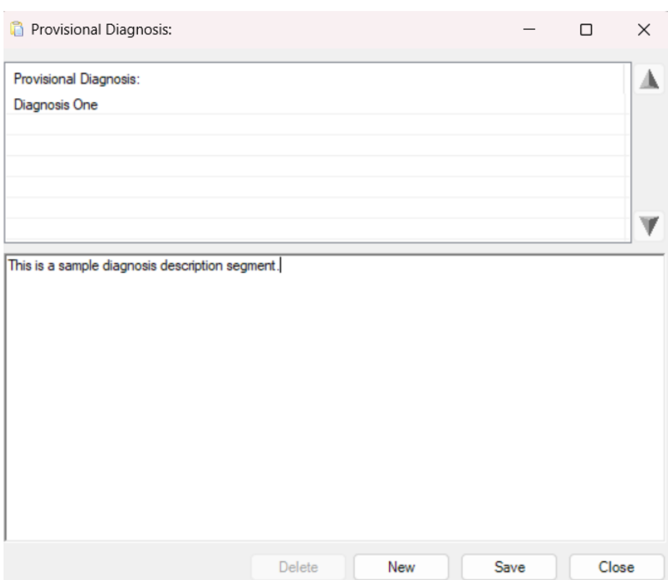
1. In the **Clinical Information** page, enter a **Ref Date (MM/DD/YYYY)** (referral date) or click the drop-down button and a calendar will appear. The default value is today's date. Press the Tab key to go to the next field.
2. Enter a **Case/Ref #;** the default value is the **Patient ID** (you can enter up to 25 characters in the Case/Ref #). Press the Tab key to go to the next field.
3. Enter a **Country** or choose one from the drop-down list. Press F2 to add values to the **Country** drop-down list. You can use this same process to customize all drop-down fields in this form.



4. Enter a **Med Dir/Ref By** (Medical Director or Referring Physician), **Phone**, **Fax** and **Email**. This is the contact information of the person or facility responsible for this referral. This is necessary in case there are any questions or additional information or clarification that is needed by the consulting physician. The Med Dir/Ref By, Phone, Fax and E-Mail fields are all related to each other. By selecting a value from the Med Dir/Ref By drop-down list, the related Phone, Fax, and E-Mail values are automatically populated. These values can be changed by simply editing the values. Press F2 to add values to the drop-down list.



5. Enter a **Provisional Diagnosis** or select relevant description segments from the Provisional Diagnosis drop-down list. Click the **Paste** button to insert selected segments or press F2 and use the Look Up Segment interface to add segments to the form.



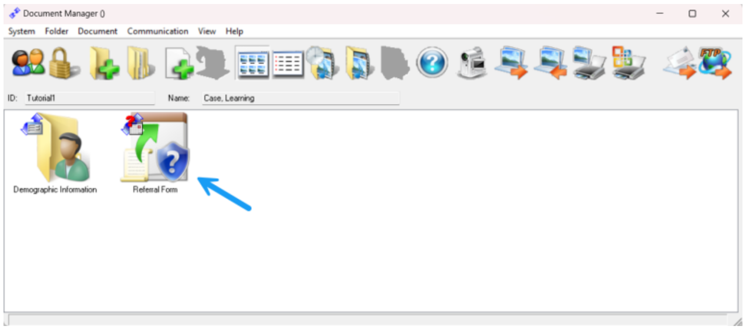
Description Segments are a powerful tool. Often used verbiage can be typed in and referenced as look up values. This allows you to create comprehensive paragraphs by selecting the segments from a list. This minimizes typing and promotes consistency of values.

More than one description segment can be selected from the list. The additional segments are added to the **Provisional Diagnosis** field separated by a blank line.

Once you have selected all of the description segments, they can be edited to make up a comprehensive provisional diagnosis.

6. Enter the rest of the information.

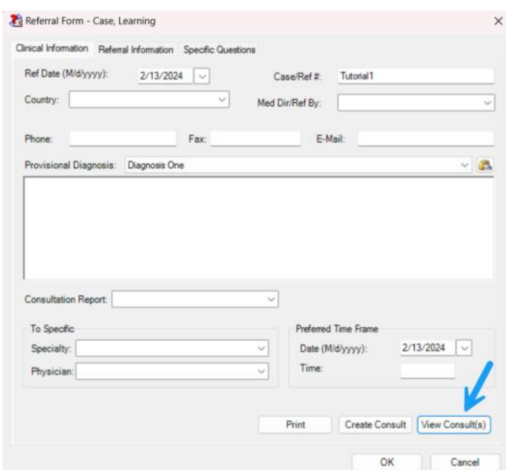
7. Click **OK** to close the **Referral Form** and save the entries. The new “Referral Form” document entry is created form the form you just filled in.



Consultation Side of a Referral

When a **Referral Form** is received by a consulting physician, it can be viewed, and printed but cannot be edited. After reviewing the referral form, the consulting physician will create a **Consultation Form.** This returned **Consultation Form** will be linked to the referral.

The **View Consult(s)** button on the **Referral Form** will open up all of the consults that were returned for the particular **Referral Form**.



Conclusion

You have completed this lesson and have learned to do the following tasks:

- Created a new **Referral Form**.
- Learned what Description Segments are and how to add them to a form.
- Learned what a consulting physician does when a referral is received.

Lesson 7

Using Email to Send Information

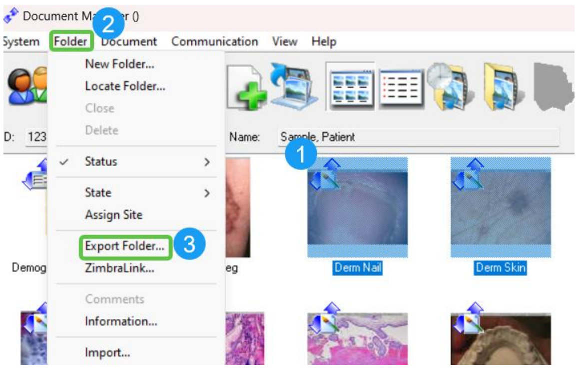
If you have an Internet connection, or are running on a computer network, you can send Second Opinion documents using email.

Second Opinion has the capability of sending several documents or images with annotations, comments, patient folder information, and other database information as a single encrypted file attached to your e-mail.

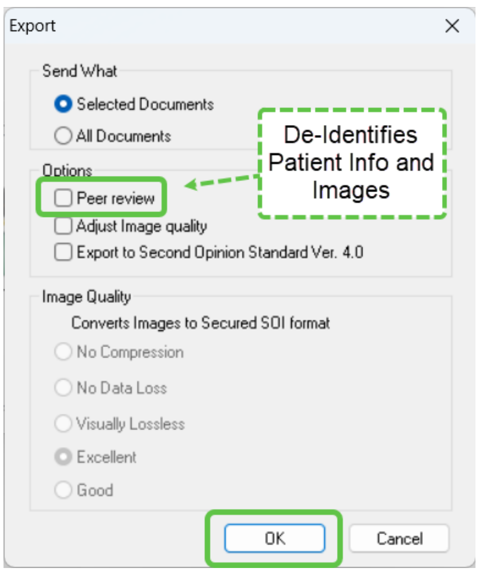
This lesson will assume you have Windows 10 or above with Microsoft Outlook. If you have a different email system, the details of the procedures may change slightly, but the overall process is the same.

Step 1. Export Folders / Send Documents

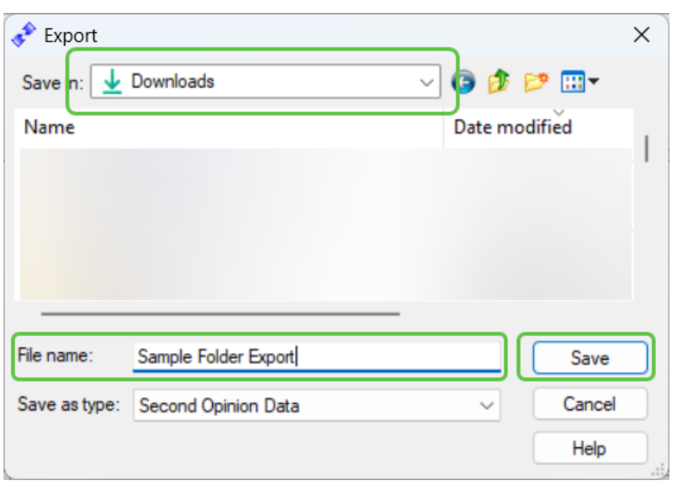
1. In **Document Manager**, select the documents you would like to send.
2. **Open the Folder** menu and **click Export Folder…**



3. Choose the desired **Export** options and **click OK**.

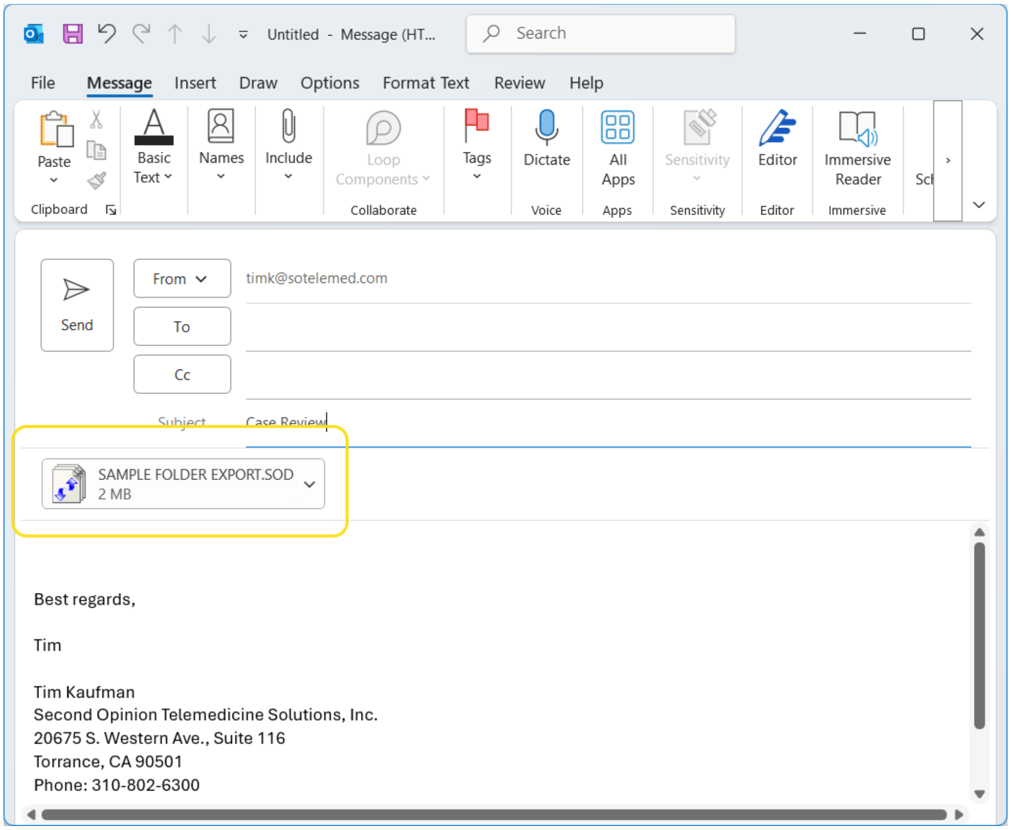


4. Choose the **Folder** location, enter the file name for the export and click the **SAVE** button.



Note: Encrypted SOD can also be saved to USB Drives to securely move them from location to location.

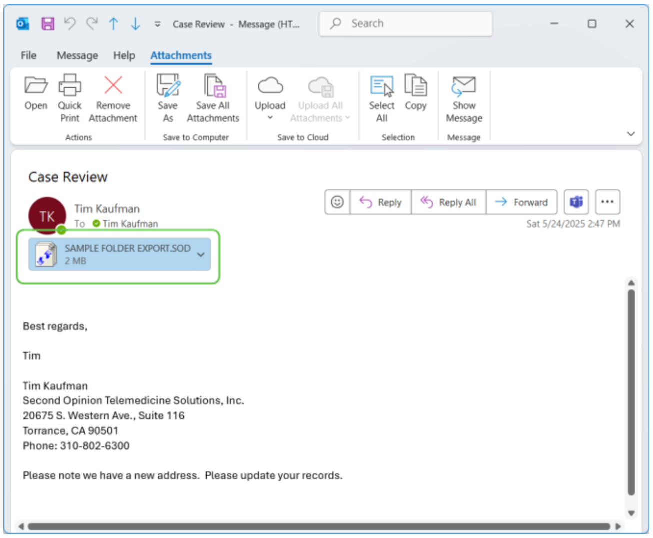
5. Compose an email message using your email client, address it, attach the SOD file to the email, and click send.



Step 2. Receive Documents

If you receive an email message with an .SOD file as an attachment, you can import the attachment into **Second Opinion** in one of several ways, depending on what your email client supports.

1. Open the email with the SOD file attached.



4. Double-click on the icon for the attached file. If you are asked what you would like to do with this file, choose **Open it**.

5. If Second Opinion Professional is not already running, it will automatically start. If no user is logged in, you will be asked to log in.

6. The folder information contained in the attachment will be created or updated as necessary, and all of the documents in the attachment will also be updated or created as necessary. Second Opinion ensures that only older information is replaced by newer information.

Conclusion

You have completed this lesson and have learned to do the following tasks:

- Export Folder and Documents to an encrypted SOD file, **Folder**, **Export Folder**.
- Attached the SOD file to an Email message.
- Open received documents, import SOD file.

Lesson 8

Using FTP to Send Information

If you have an Internet connection, you can have Second Opinion send documents using SFTP (internet Secured File Transfer Protocol) instead of email.

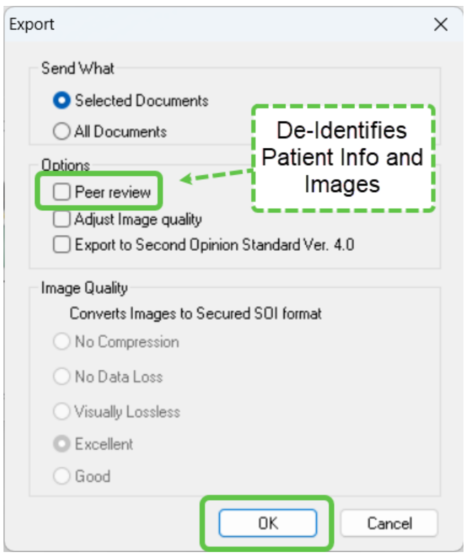
Second Opinion has the capability of uploading several documents or images with annotations, comments, patient folder information, and other database information as a single encrypted file. There are times when the attached encrypted file is too large to send via email or you do not have a valid email client set up on the computer, you can send the information via FTP Send. Using this feature, the SOD file is uploaded to a secured server via the SFTP protocol. Once it is uploaded, an email with a link to the encrypted file is sent to the recipient. The recipient can click on the link to download the file and import it into Second Opinion.

This lesson will assume you have Windows 10 or above with an internet connection.

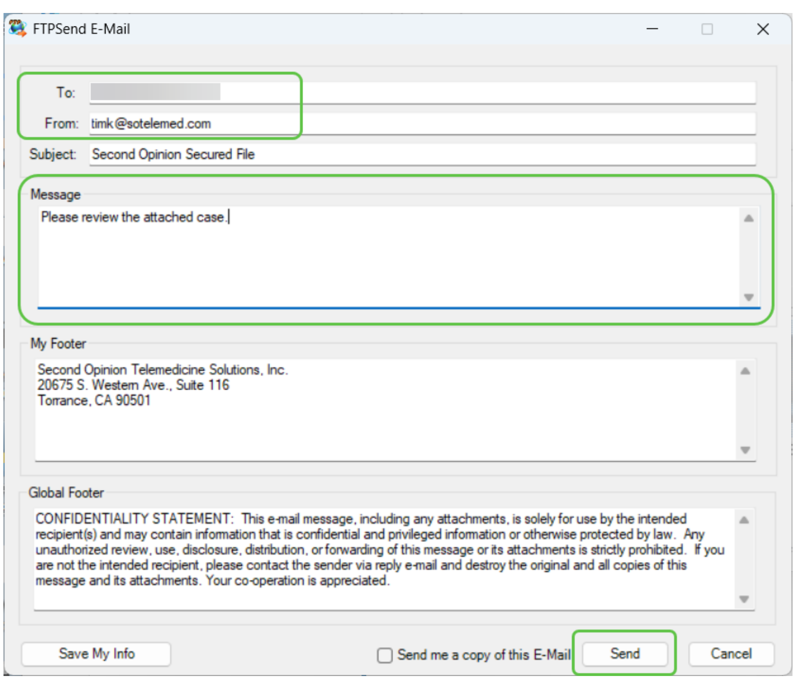
Step 1. Send Documents using FTP Send

1. In **Document Manager**, select the documents you would like to send.
2. Open the **Communications** menu and click **Send Using FTP…** A dialog box will appear to offer you other options. The selected documents and folder information will be collected and processed into an encrypted **Second Opinion Data** file.

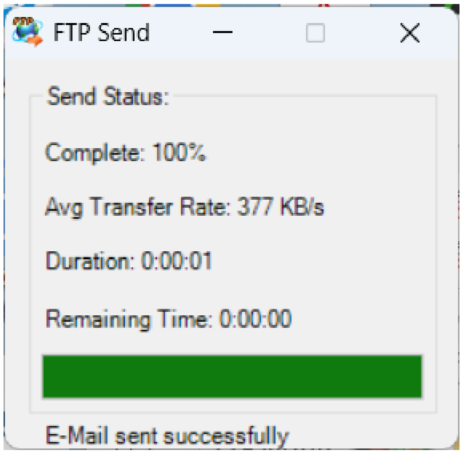
Send Using FTP button



3. Fill in all the appropriate information in the FTPSend form. You must specify the “To” and “From” Email addresses. The “Save My Info” button saves the information you have entered as default values and will not need to be entered next time. Type any message you wish and **Send**.

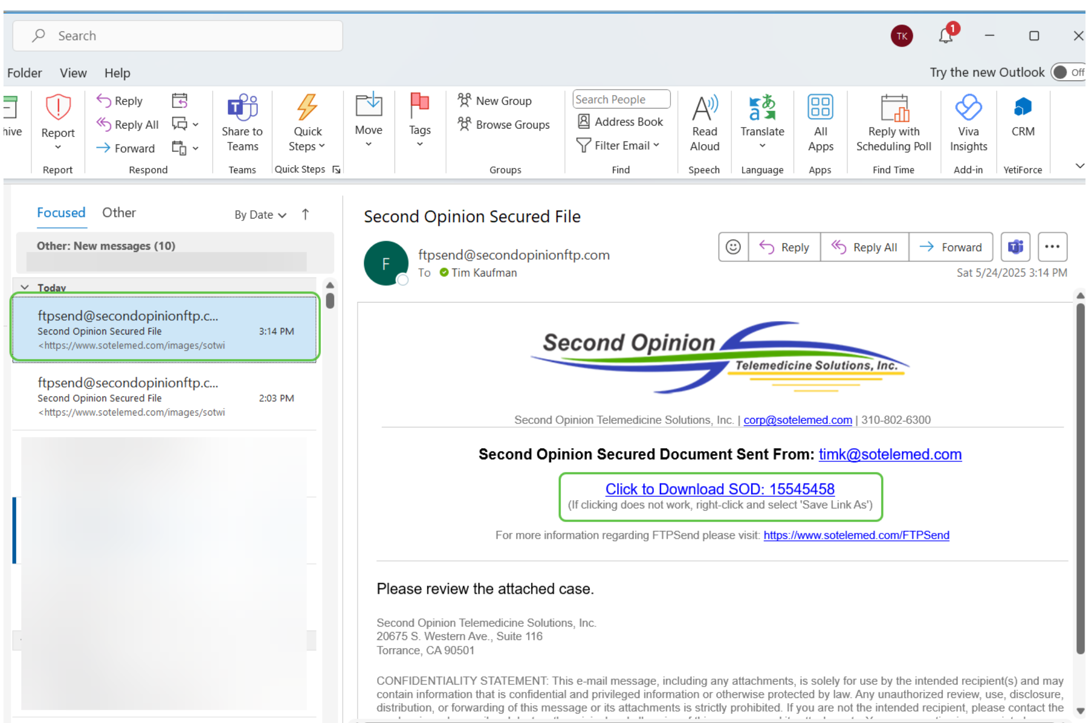


4. You will see a FTP Send Status box indicating the file is being uploaded. When complete, an email with a link to the file, will be sent.



Step 2. Receive Documents

1. If you receive an email from **ftpsend@secondopinionftp.com**, someone has sent Documents to you via FTP Send.
2. Click on the message entry. This should display the contents of the message.
3. Click on the Click to Download SOD link. If you are asked what you would like to do with this file, choose **Open**.



4. If Second Opinion Professional is not already running, it will automatically start. If no user is logged in, you will be asked to log in.
5. The folder information contained in the FTP link will be created or updated as necessary, and all the documents will also be updated or created as necessary. Second Opinion ensures that only older information is replaced by newer information.

Conclusion

You have completed this lesson and have learned to do the following tasks:

- Send documents using FTP Send, **Communications**, **Send Using FTP.**
- Open received documents