Perspectum Portal

Customer User Guide

PDM9003

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1. Introduction

This document is intended to be used as a customer guide to using Perspectum Portal, Perspectum's online Portal for uploading data to its Quantitative Analysis Service (QAS).

2. Scope

This document provides general instructions for the use of the Perspectum Portal, including legal disclaimers, an overview of the key features, a guide to the workflow, information required for setup and FAQs.

Terms and Abbreviations

Term	Meaning
Blinded report	A 'blinded report' is a report that users can't access without generic user download permission. This report status is used within clinical trials to limit access to trial data.
Dashboard	The 'homepage' of Perspectum Portal. Users can see all Studies from Projects that they have access to here
MRI	Magnetic Resonance Imaging
Organisation	A business (e.g. University, Pharmaceutical company, Radiology Centre) who own or contribute to Projects
Patient Identifiable Information	Information which is private to an individual and which could enable the identification of that individual. For example, name and address or information about health
Perspectum Portal	Formerly Edison. Perspectum's cloud-based Portal for data transfer and delivery.
Perspectum Portal User	Anyone who has access to Perspectum Portal. A Perspectum Portal User must be affiliated to an Organisation
Project	A collective term for a group of related MRI datasets, e.g. a clinical service or a pharmaceutical trial, identified as such for ease of billing and access. All Studies must belong to a single Project
QAS	Quantitative Analysis Service
Study	A dataset from a single patient and a single scanning session. Studies are uploaded to Perspectum Portal for analysis

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If you have any questions about the Guide, please contact Perspectum's support team via email at support@perspectum.com.

Perspectum Portal is the interface through which Perspectum's Quantitative Analysis Service (QAS), which includes Liver*MultiScan*, is delivered to our customers. Its key features are shown in Figure 1.

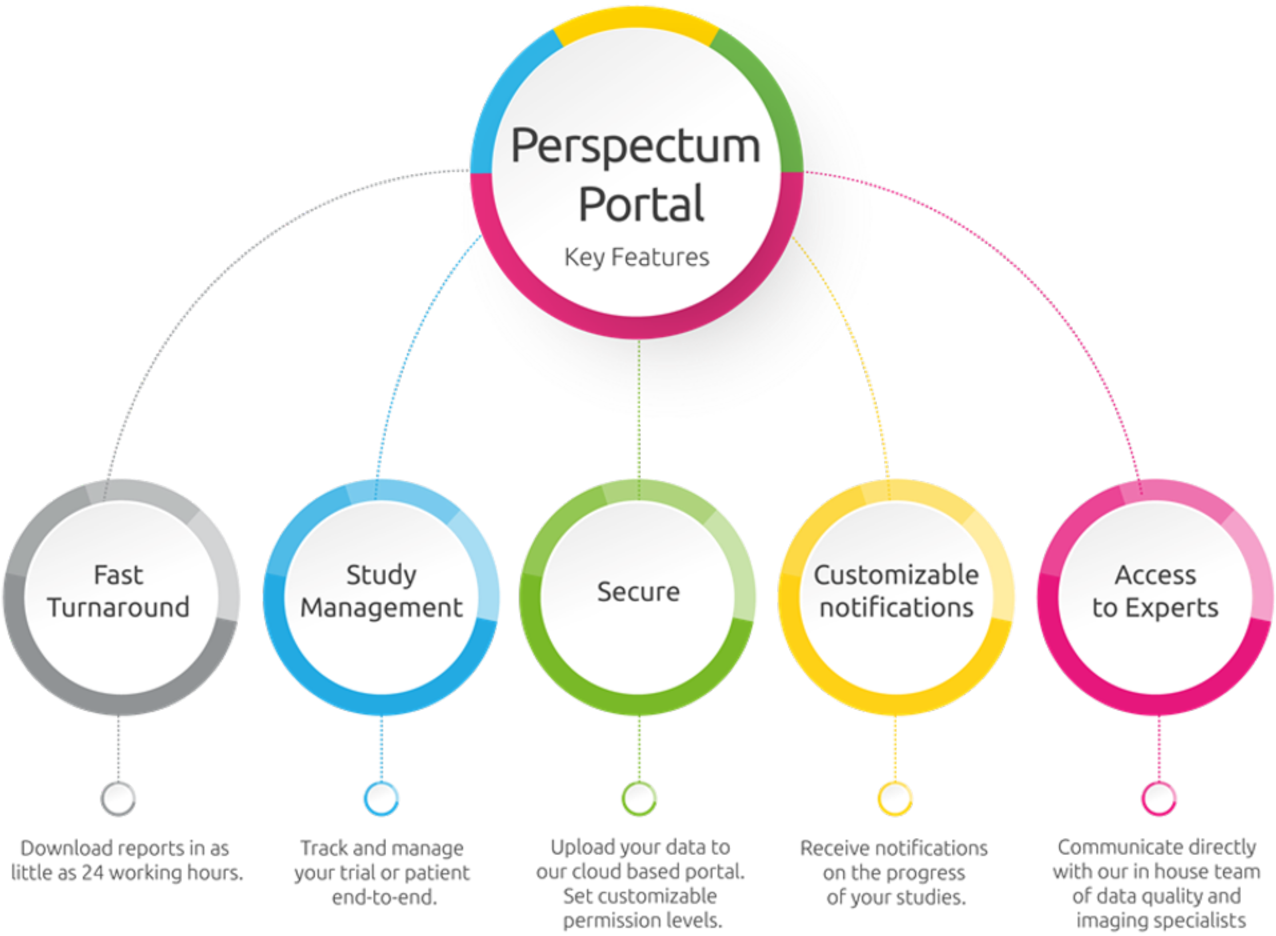


Figure 1 Key features of Perspectum Portal

Getting started

When you first log on to Perspectum Portal, you are taken to the **Dashboard** (Figure 2). This shows all the patient studies that have been uploaded that you have access to. Each row refers to an individual patient dataset (referred to as a 'Study') defined by its **Study ID**. Every Study is associated with a **Project**. **'Projects'** can be clinical services, research studies or clinical trials.

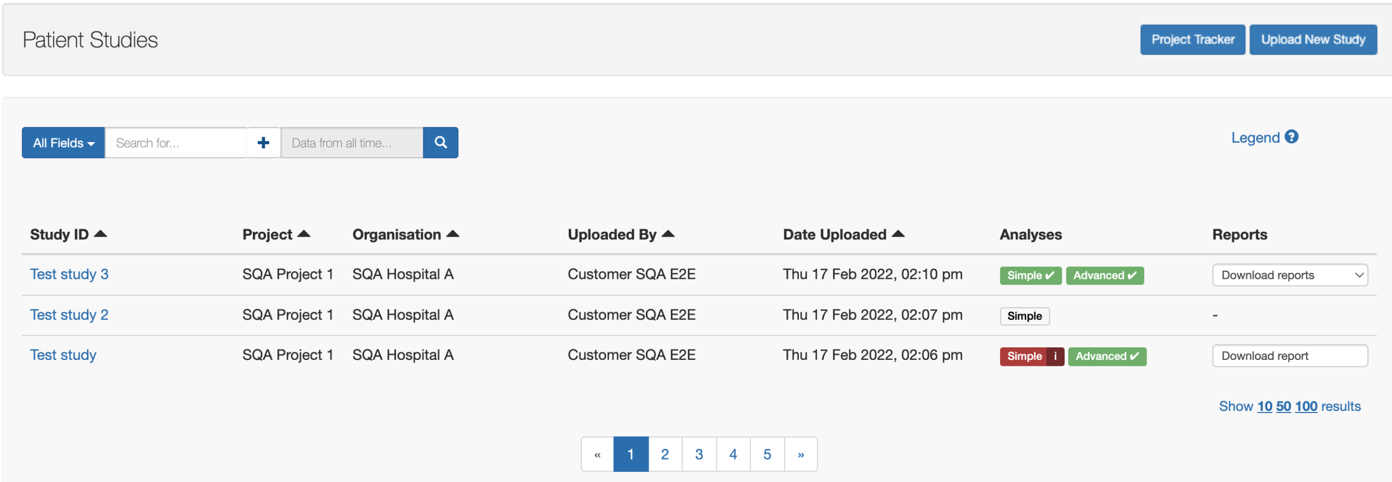


Figure 2 Dashboard page of Perspectum Portal listing all patient studies that have been submitted for analysis.

The dashboard shows whether the report is available for each Study via the '**Reports**' column. Where it is available you will see the option to **'Download report'**.

The Dashboard can be filtered by Study ID, Project, Analysis Type, Organisation, Date Uploaded and who uploaded the study using the '**Search for…..**' search bar. You can also search for datasets uploaded over specific time periods, by clicking on the adjacent '**Showing data from all time…**' window (*Figure 3*). Both text and data searches can be exited by clicking on the cross icon at the end of '**Search results for:**'.

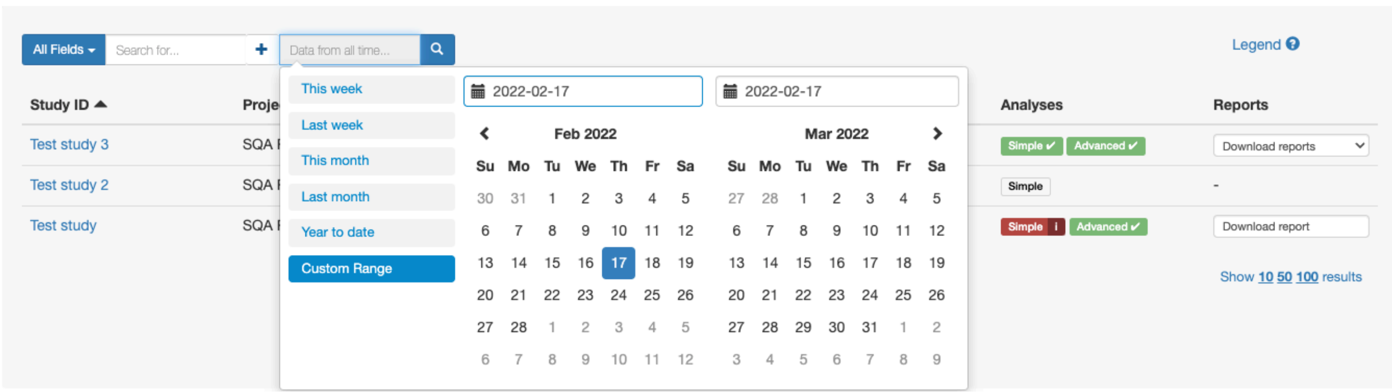


Figure 3 Search by date or time period

The number of studies visible at a time on the Dashboard can be altered. On the bottom right of the list of studies on the Dashboard, use the number selectors to change the number of studies that are shown, as shown in Figure 4. Currently, either 10, 50 or 100 studies can be selected for display at a time on the Dashboard.

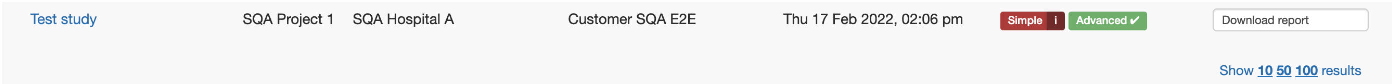


Figure 4 Selecting the number of Studies to display on the Dashboard

Uploading a new study

1. On the **Dashboard** (Figure 2), click on the 'Upload New Study' link

Select Project

2. At the Upload Patient Study page (Figure 5) choose the **Project** that the Study is associated with (Figure 6). This may be a specific clinical trial, research project or clinical service project

Label your study

3. For clinical trials, where anonymised subjects are scanned at multiple timepoints, the Project will have been set up to expect both a **Patient ID** and a **Timepoint** entry for each scan. For such projects, both these fields will appear on the 'Upload' page and are mandatory. Select an existing **Patient ID** or create a new **Patient ID** following any specified naming conventions, ensuring it does not contain any **Patient Identifiable Information**. Select a **Timepoint** from the drop-down menu. The **Study ID** will be automatically generated based on the **Patient ID** and **Timepoint** selected.

4. Other kinds of Project (e.g. clinical scans or research projects without multiple timepoints) don't require a Patient ID and a Timepoint, rather just a single **Study ID.** This Study ID must not contain any **Patient Identifiable Information; however, it may contain information that identifies the scan, such as an accession number. It could also be a deidentified patient ID.**

Select the Uploading and Referring Organisations

5. Select the **Uploading Organisatio**n (usually the Imaging Centre where the data was acquired) and, if required, the **Referring Organisation** (usually the clinical site where the referral for the scan has come from**)** that the **Study** is associated with. You will only be asked to select a Referring Organisation, if they have been set up for your selected project.

6. Select the applicable **Analysis Type** (note that more than one can be selected) (Figure 7). Note that if you forget to add an Analysis Type, it can be added later in the study view page by users with the required permissions.

7. Provide any additional details or requests for analysis in the comments window.

8. Drag and drop the patient study into the file upload window at the bottom of the page (Figure 5). **We highly recommend zipping the files/folders of the patient study in to one zip file as it will upload much faster than adding the individual files.**

9. Press the **Submit** button.

10. The data will now appear as a New Study in the **Dashboard**.

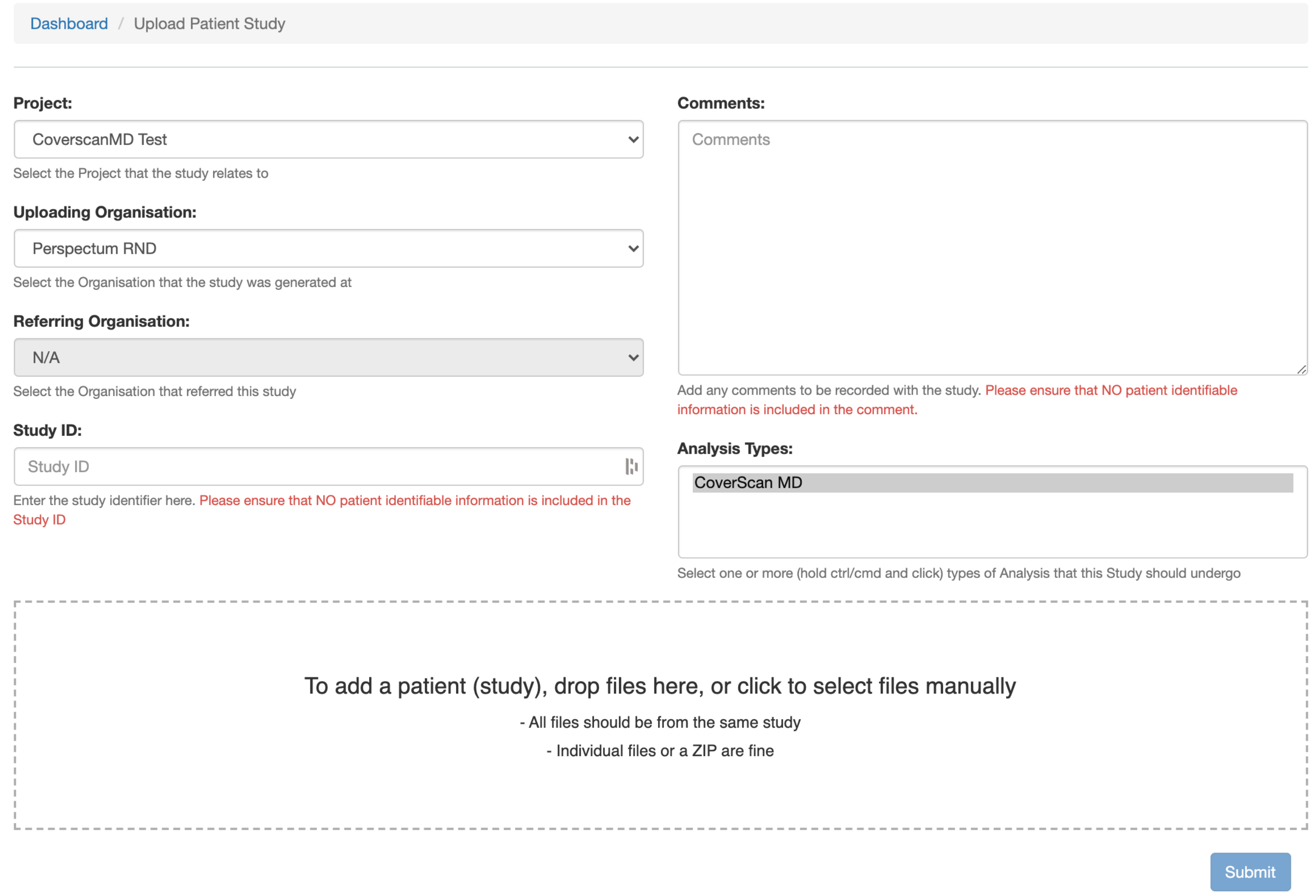


Figure 5 Upload Patient Study page. File upload window is at the bottom of the page. *<u>Note that some of these fields may not be available for your Project.</u>*

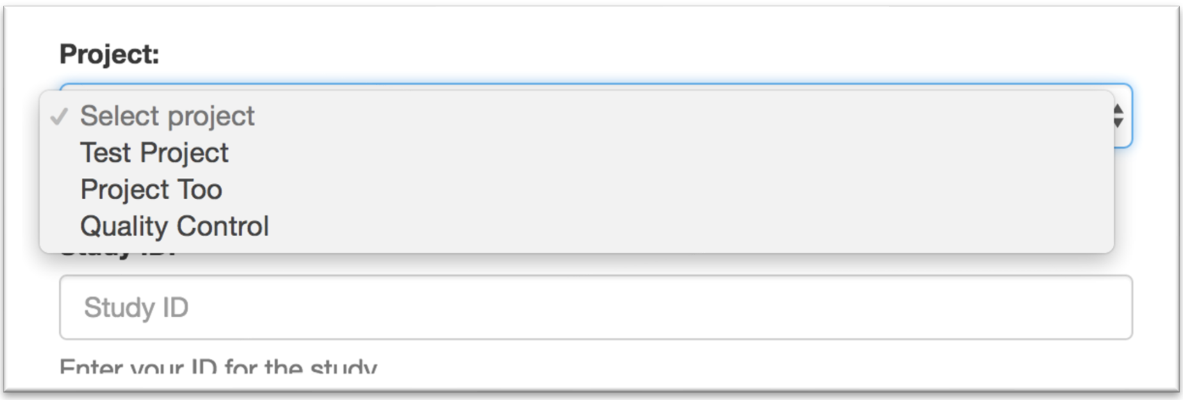


Figure 6 Select project drop down menu

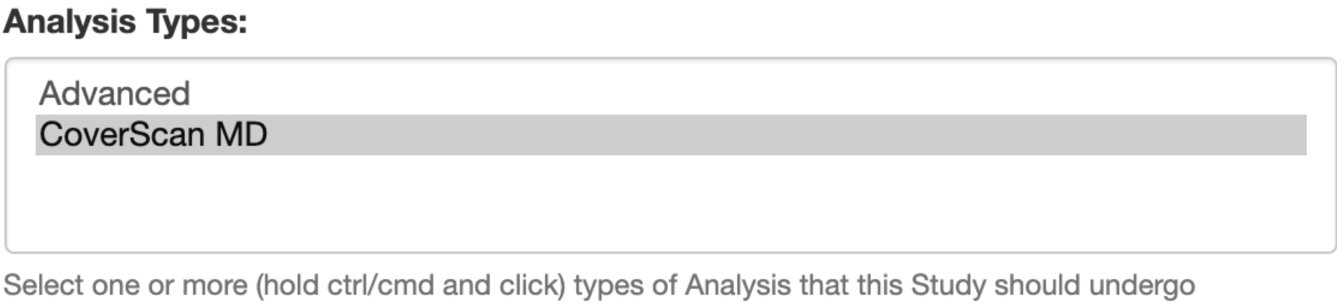


Figure 7 Select analysis type

Request a Re-analysis

If you have been given permission to request a study re-analysis, and the project allows it, you can do so via the **Summary** tab (Figure 8).

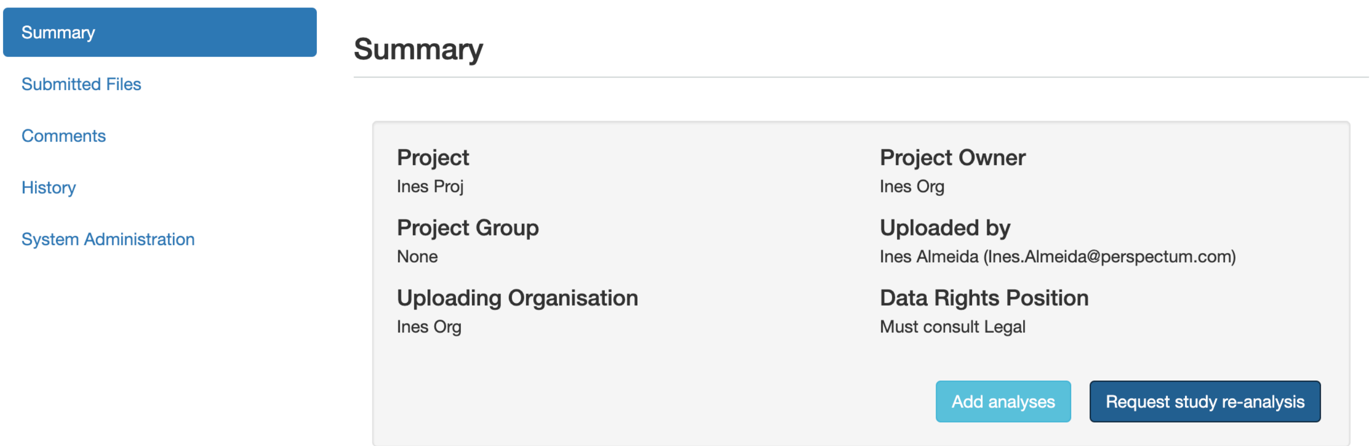


Figure 8 Reanalysis requests are made from the Summary tab

After clicking “Request study re-analysis”, a window will appear showing the re-analysis options (Figure 9). All available fields must be completed to continue with your re-analysis request. Once you have requested a Re-analysis, a new entry will appear on your dashboard which will be processed as another study.

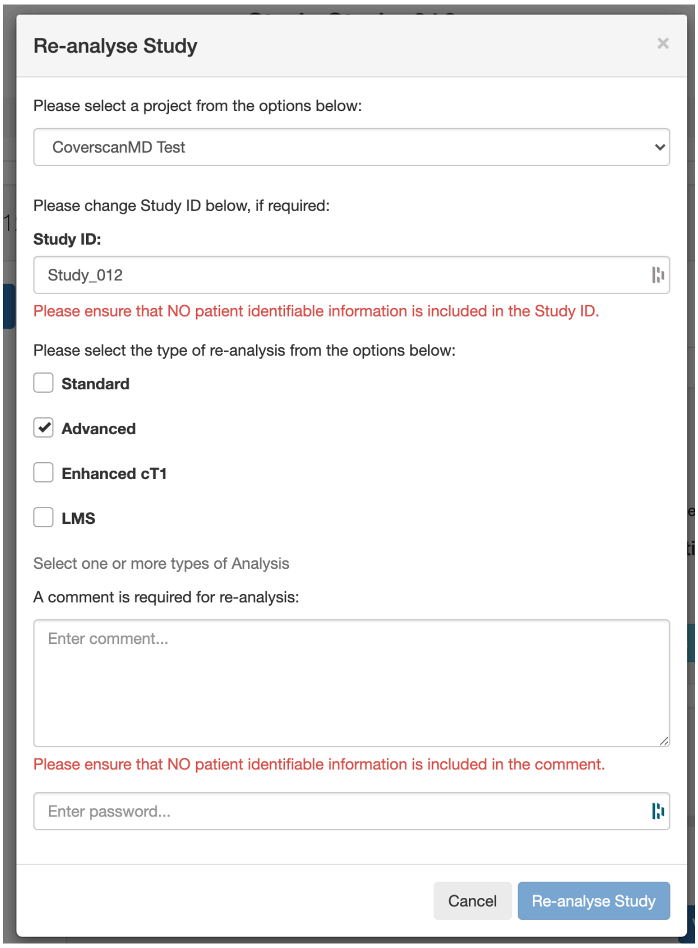


Figure 9 Request a re-analysis

The Project Tracker

If a Project Tracker has been configured for your project, and you have permission to view it, you can explore it by pressing the “Project Tracker” button on the **Dashboard** (Figure 2). The Project Tracker allows you to take a bird’s eye view of your whole project. From here you can follow the progress of all patients within your project (in progress, delivered or returned without analysis), and navigate to individual analyses of interest, across multiple timepoints. You can also filter by Analysis Type, if desired. You can also export your project tracker by clicking the Export button shown in Figure 10. Note that the Analysis Type filter applies to the Export as well, so the .csv file will only contain the selected Analysis Type.

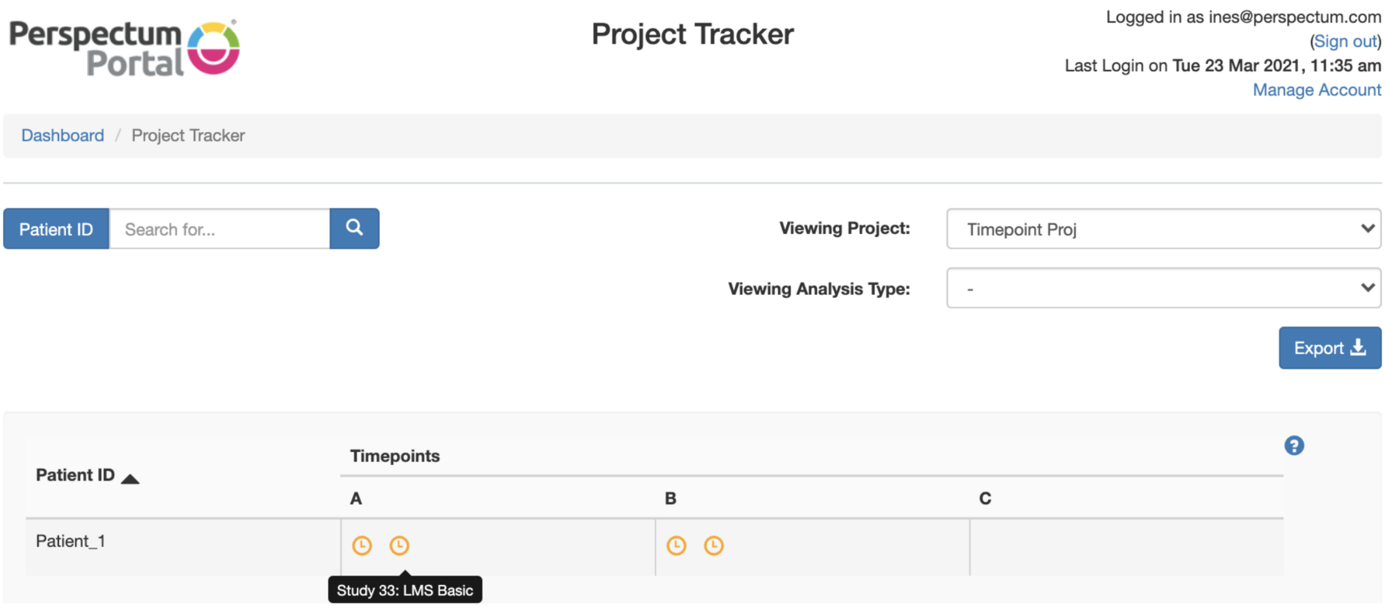


Figure 10 The Project Tracker

Exploring Studies

Clicking on the related **Study ID** for a study on the **Dashboard** opens the **Study** page (Figure 11). Here you can find details of the Study including the **Project, Project Owner**, who it was **Uploaded by,** the **Uploading Organisation**, the **Referring Organisation**, **Patient ID** (if any), **Timepoint** (if any), as well as the **History** of updates to the Study.

Each analysis is displayed on this page – there is a button to download the report (if available), as well as a button to view the analysis in more detail (see below).

Any comments attached to the Study can be accessed via the **Comments** tab. If there have been any issues with the quality of data acquisition, these will be available here. You can also filter comments by Analysis Type.

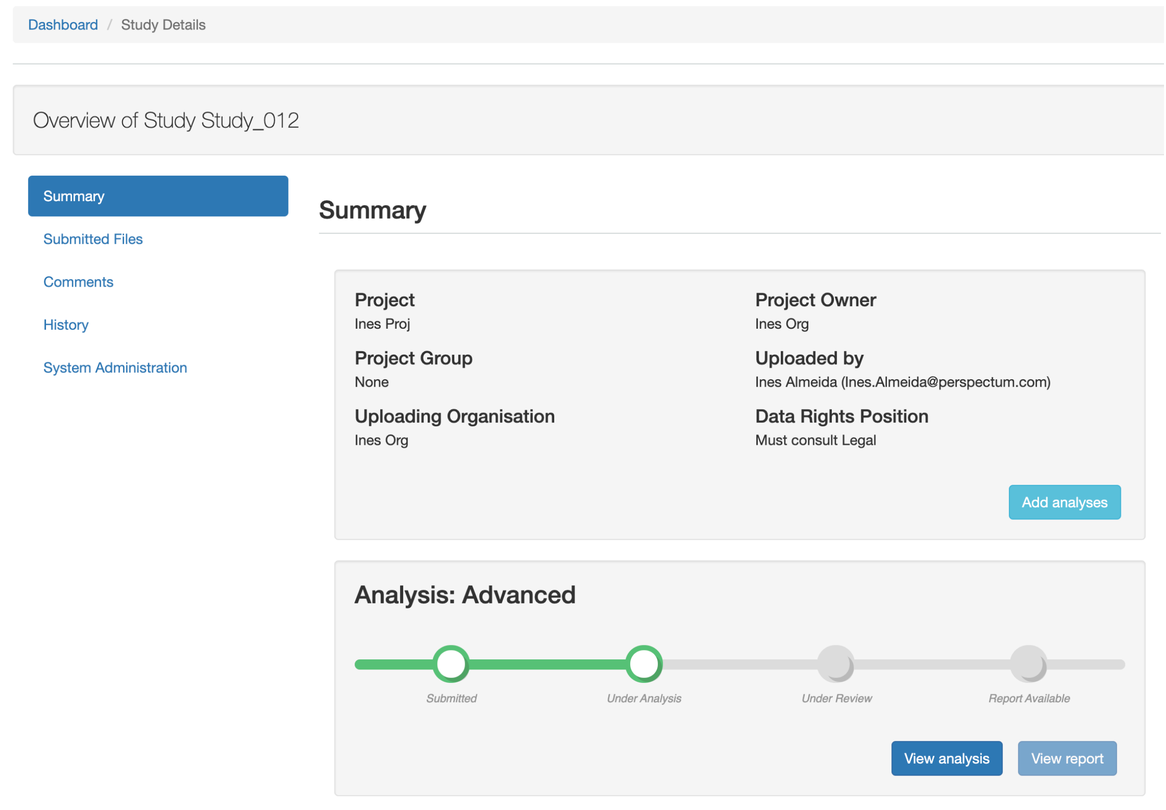


Figure 11 Overview of an individual study

Submitted files

The data submission can be viewed in the **Submitted Files** tab (Figure 13). Perspectum Portal pulls information directly from the uploaded **Study**, including the scanner model and software version that the data was acquired with, together with the date that the **Study** was acquired and the **Patient ID** (if entered on the scanner).

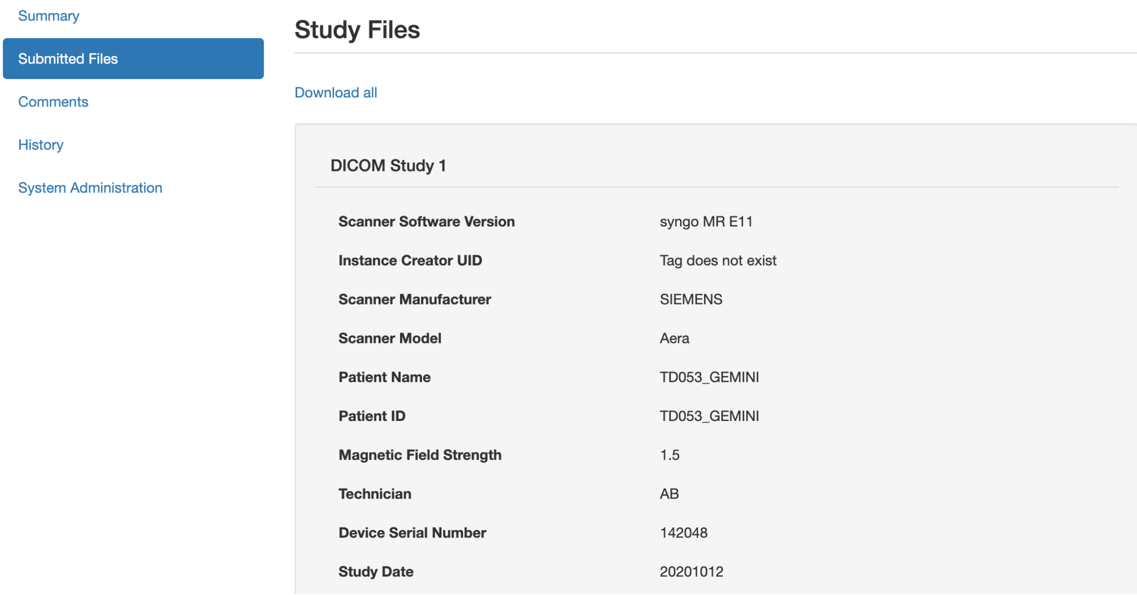


Figure 12 DICOM Study overview

Exploring Analyses

Within the Analysis Details section, you can find more details relating to each individual analysis, including Data Files, and Reports.

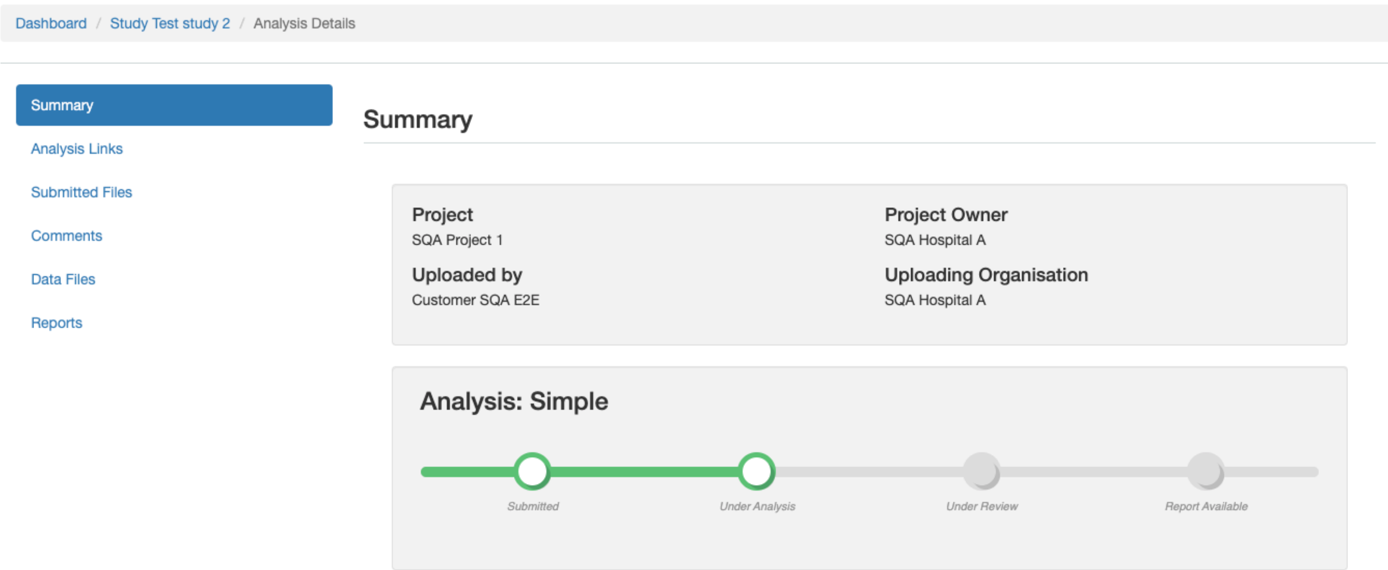
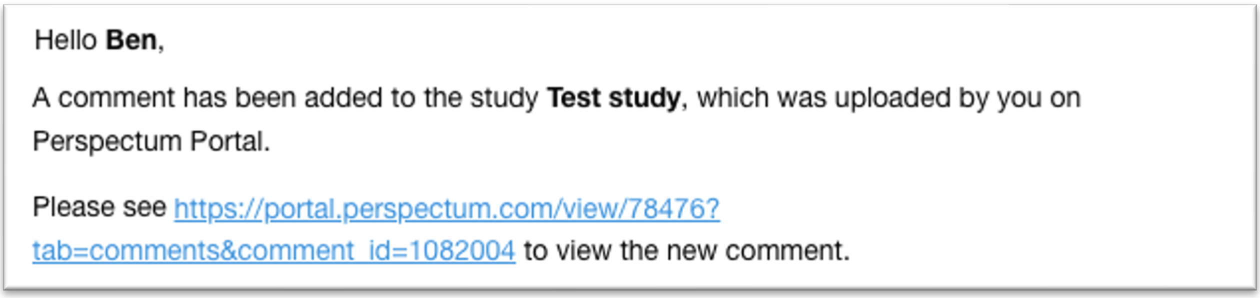


Figure 13 Overview of an individual analysis

Study Communications

The **Comments** tab is where communications about a **Study** are displayed. You can also leave comments about a specific **Analysis**, if applicable.

We may also send an email alerting you that a response is required. An example email is shown in Figure 14.


Hello **Ben**,

A comment has been added to the study **Test study**, which was uploaded by you on Perspectum Portal.

Please see https://portal.perspectum.com/view/78476?tab=comments&comment_id=1082004 to view the new comment.

Figure 14 Example email requesting a response from a Customer.

What Quality Check Cautions mean

If configured for your Project, Perspectum Portal may detect certain issues with a **Study**, as shown in Table 1.

Table 1. Quality Check Cautions

Quality Issue	Probable cause	Recommended action
No DICOM Data	No DICOM data was present in the uploaded study data	Re-upload the full dataset
Prior Upload	The unique study identifier of your study has been previously uploaded to Perspectum Portal	Check that the uploaded data is correct and reupload if required
Missing Series	Incorrect or incomplete acquisition or upload	Check that series data was acquired and reupload
Duplicate Data	Study files have been duplicated within a dataset upload	Check that the uploaded data is correct and reupload if required
Multiple Studies	More than one unique MRI study uploaded in a single upload	Reupload individual studies separately

Quality Check Cautions are shown in the **Submitted Files** tab (e.g. Figure 15). Clicking on one of the Quality Check Cautions (e.g. Missing Series) provides further information on the problem.

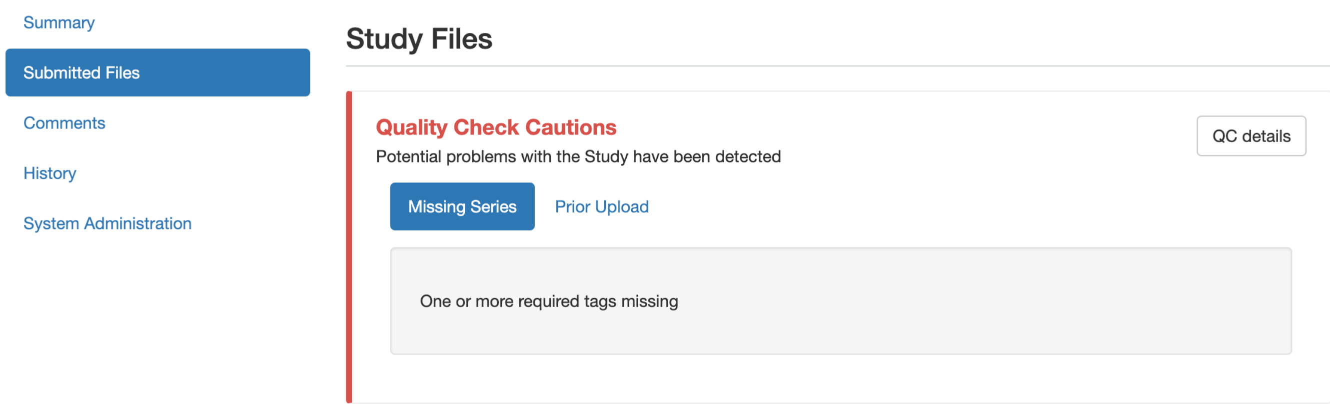


Figure 15 Caution where Missing Series, as well as a Prior Upload, has been detected

How can I manage my account?

Your account management page can be reached by clicking on **Manage Account** at the top right of the **Dashboard**. Here you can change your email address and password as well as checking which **Projects** you have access to and recent account activity (Figure 16)

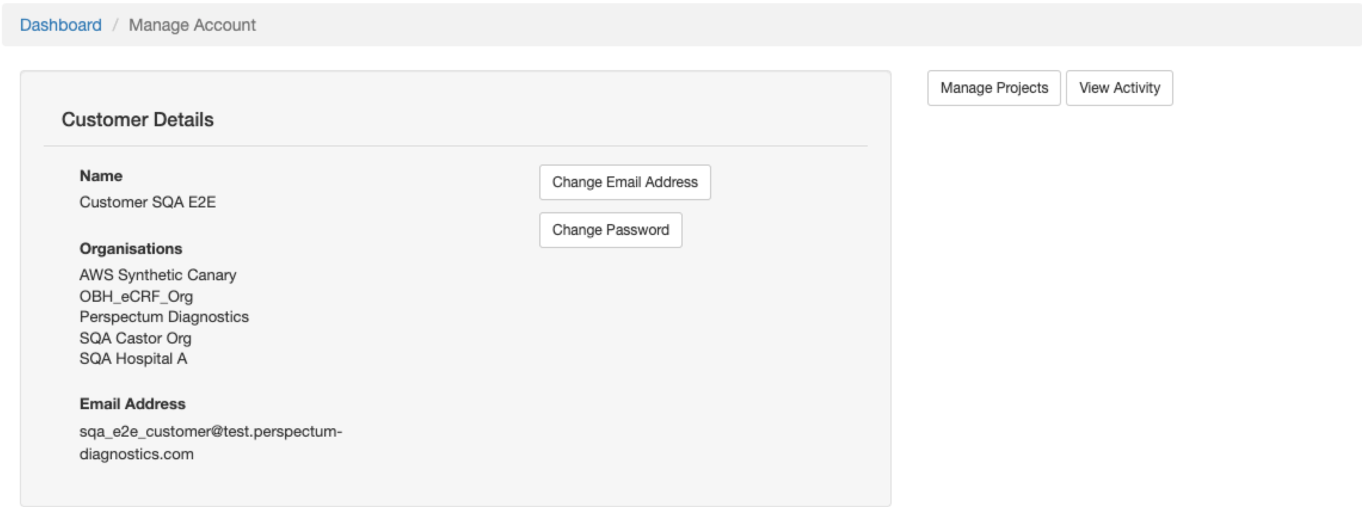


Figure 16 Account management page. Top left: Customer details pane.

Changing your email address

To change your email address, click **Change Email Address** in the **Customer Details** pane. You will need to enter your new email address, together with your password.

Changing your password

To change your password, click **Change Password** in the **Customer Details** pane of the **Manage Account** page. You will need to enter your existing password as well as your new password. To keep your data as safe as possible, passwords must meet these criteria:

- Contain at least 8 characters
- Contain at least one lowercase character, one uppercase character and a number
- Not be entirely numeric

Passwords should be known only to the person that they have been assigned to. They should not be written down, emailed or passed among colleagues. If you suspect that your password has been compromised, change it as soon as possible, and contact support@perspectum.com

N.B. Passwords must be updated periodically to ensure ongoing security of data.

Managing your projects

To manage your projects, click **Manage Projects** (Figure 16). This opens the list of **Projects** that you have access to, together with your individual permissions and notifications for that **Project**. Depending on your role, you may have permission for all, some or none of the following actions:

- Download Blinded Report – User can still download reports that have been set to blinded
- Download Dataset – User can download the data uploaded to the study
- Download Data Files – User can download any additional data files uploaded to the study
- Download Report – User can download reports uploaded to the study (that have not been set to blinded)
- Re-analyse Study – User can request re-analysis of a study
- Upload Dataset – User can upload data to the Portal during study upload
- View Project Tracker – User can view the Project Tracker for that project, if available

You can also check whether you are receiving notification emails:

- ‘Daily’: the status of one or more of your Study Datasets has changed in the last twenty-four hours (daily update).
- ‘Rejection’: all analyses from a study have been rejected (real-time as soon as it is rejected).
- ‘Quality issues’: a Study Dataset has raised one or more quality check cautions.
- ‘Report Delivered’: a report has been delivered on a study.

Activity log

To view the recent activity on your account, click **View Activity** (Figure 16). In the Activity screen you can then see:

- Previous logins (successful and unsuccessful)
- Changes of password or email
- When you uploaded **Studies**
- When you viewed or downloaded **Reports** and data.

Subscribing and unsubscribing to Project Notifications

You can change your notifications preferences for all **Projects** to which you have access at any time. Simply check or uncheck the notification boxes to the right of the **Project**.

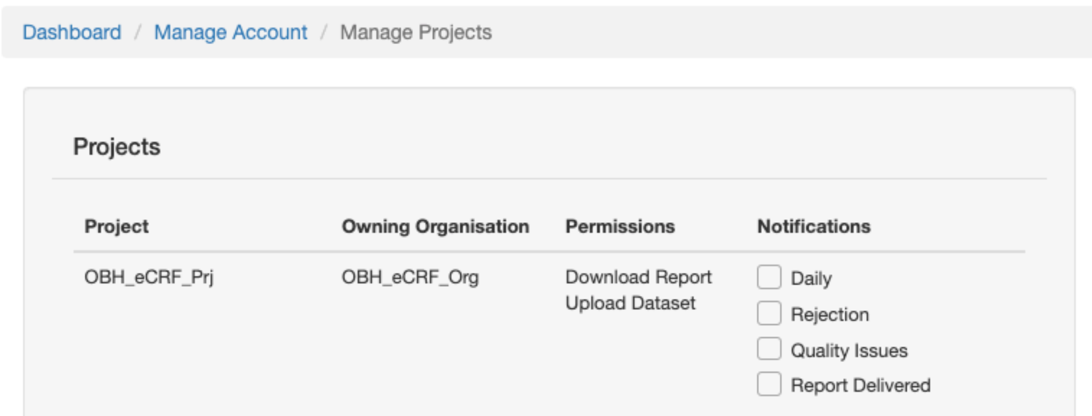


Figure 17 Project section on Account Management page. You can subscribe or unsubscribe to available projects at any time.

Setting up new Projects

To add a new **Project** to your **Organisation**, you will need to contact a member of our Service team, who will guide you through the setup process, to ensure we have the appropriate details. For each **Project** that your **Organisation** owns, the following information is required:

1. A list of **Staff users** who have permission to view the **Project**

2. For these staff, the following **Permissions/Preferences** must also be defined
   a. Upload Study
   b. Download Report
   c. Download Blinded Report
   d. Request Re-analysis
   e. Rejections notification email
   f. Daily update email
   g. Add analysis/request re-analysis
3. A list of **Organisations** (excluding yours, the owner **Organisation**) who also have access to the **Project** (partner **Organisations**).

For each **Project** that your **Organisation** contributes to but does not own, the information in points 1 and 2 of the above list will still be required. This may need to be confirmed by the **Organisation** who owns the **Project** (e.g. a pharmaceutical company sponsoring a multicentre trial).

Note: Where there are multiple sites contributing to a **Project** owned by another **Organisation**, members of the individual sites will only be able to see **Project** data uploaded at their site.

Security – keeping your data safe

Data security is of paramount importance. All Perspectum Portal users have their own individual usernames and passwords. Permissions for overview, data upload and report download are set on a Project-by-Project basis and can be updated on request.

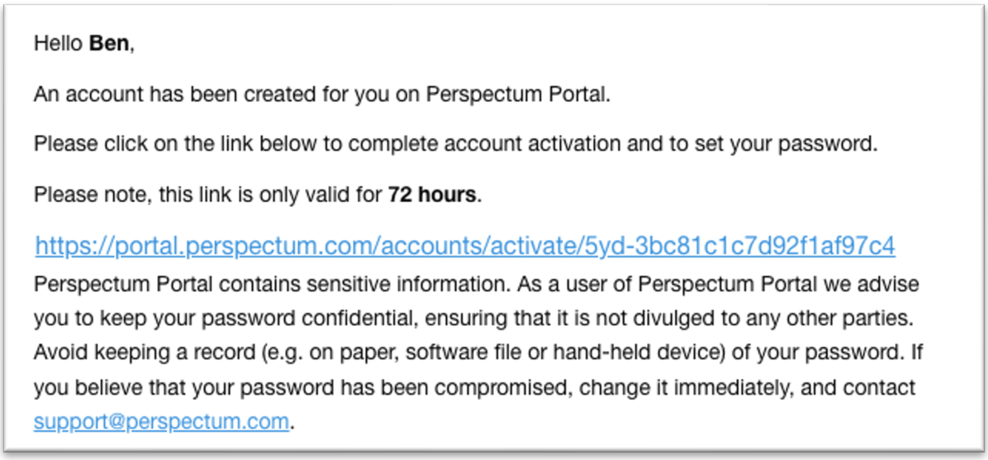
Perspectum Portal contains sensitive information. As such, the utmost care should be taken to avoid unauthorised access. To do this, please follow this guidance:

- Perspectum Portal should only be accessed by authorised users.
- You should avoid keeping a record (e.g. on paper, software file or hand-held device) of your password. If you believe that your password has been compromised, change it immediately and contact the Support desk.
- Passwords should be secure (see **Changing your password** for guidance).

Adding new users

Account activation

Perspectum Portal is accessed through https://portal.perspectum.com. If you haven't accessed Perspectum Portal before, you will first need to activate your account. You should have received, or will soon receive, an email similar to that shown in Figure 18. It is important that you follow the instructions to complete activation within the time given.



Hello **Ben**,

An account has been created for you on Perspectum Portal.

Please click on the link below to complete account activation and to set your password.

Please note, this link is only valid for **72 hours**.

https://portal.perspectum.com/accounts/activate/5yd-3bc81c1c7d92f1af97c4

Perspectum Portal contains sensitive information. As a user of Perspectum Portal we advise you to keep your password confidential, ensuring that it is not divulged to any other parties. Avoid keeping a record (e.g. on paper, software file or hand-held device) of your password. If you believe that your password has been compromised, change it immediately, and contact support@perspectum.com.

Figure 18 Example activation email

If you need further assistance, please contact your account manager via email support@perspectum.com or telephone +44(0) 1865 655342.

Any changes to **Project** access require written confirmation from the **Organisation's** primary contact.

Changing existing user permissions

Access to a **Project** can only be granted by the **Organisation** that owns that **Project**, or an authorized delegate. When **Projects** are initially set up, we ask the **Organisation** to provide details of **Staff Users** at contributing **Organisations**. New **Staff Users** can be added at any time by the **Project**-owning **Organisation** contacting Perspectum.

The primary contact at the site should email support@perspectum.com with the user's name (first and last), email address, what **Projects** they need access to and what permissions they will require. The same procedure is required for changing access rights.

Browser requirements

Perspectum Portal currently supports the internet browsers as defined below:

- Google Chrome on Windows and Mac Operating System (OS).
- Firefox on Windows and Mac OS.
- Microsoft Edge on Windows
- Safari on Mac OS.

Internet Explorer and Opera are not supported by Perspectum Portal. Note that browser support is subject to change, particularly when historic browsers reach end-of-life. **If you are unsure of your browser, please contact your system administrator.**

Forgotten password

At the login page, click on the 'Forgotten Password?' link. This will send an email to your registered address with further instructions.

I can't see the data I am expecting to see

To be able to see a **Study**, you must have both membership of that **Project** AND membership of an **Organisation** that is connected to that **Project**. There are four categories of **Organisational** access:

1. **Project-Owning Organisation**
   If you are a member of an **Organisation** who owns a **Project** AND you are a member of that **Project**, you can see ALL data within that **Project**, even if it comes from **Organisations** outside of your own.
2. **Project-Uploading Organisation**
   If you are a member of an **Organisation** who uploads **Studies** to (but does not own) a **Project** AND you are a member of that **Project**, you can see data within the **Project** that has been uploaded by YOUR **Organisation** only. You cannot see data that comes from an **Organisation** that you are not a member of.
3. **Project-Partnering Organisation (e.g. a Contract Research Organisation)**
   If you are a member of an **Organisation** who is Partnering with an **Organisation Project** AND you are a member of that **Project**, you can see ALL data within that **Project**, even if it comes from **Organisations** outside of your own.
4. **Project-Referring Organisation**
   If you are a member of an **Organisation** who refers studies for upload to (but does not upload or own) a **Project** AND you are a member of that **Project**, you can see data within the **Project** that has been referred by YOUR **Organisation** only. You cannot see data that comes from an **Organisation** that you are not a member of.

Something else?

If you encounter problems whilst using Perspectum Portal, you can contact us through the **Report a problem** link at the bottom of the **Dashboard** page. This brings up a form where you can summarise the problem (Figure 19) To enable us to provide a solution as quickly as possible, please provide as much information as possible. We would recommend including:

- What you were attempting to do
- What you were expecting to happen
- What actually happened
- Any error message you saw
- What web browser you are using to access Perspectum Portal

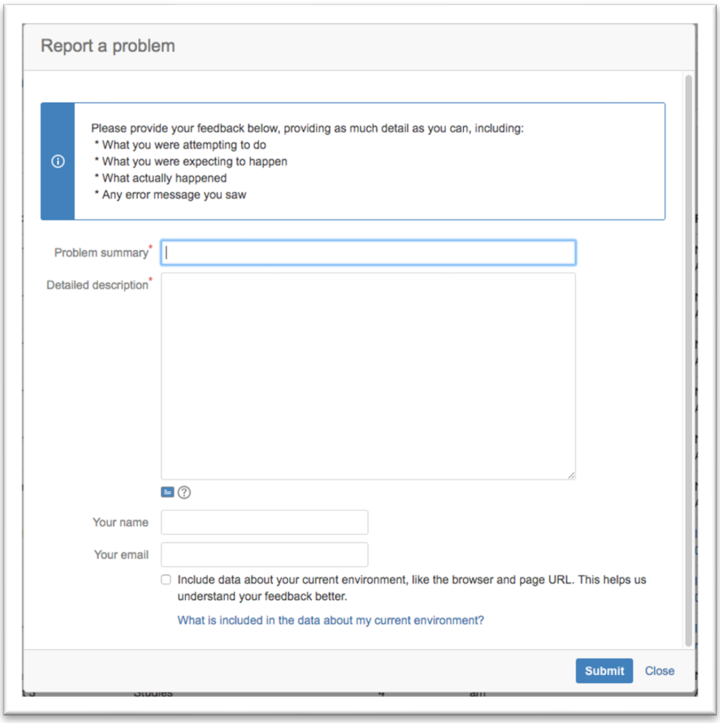


Figure 19 The Report a Problem form

Alternatively, please contact support@perspectum.com or by telephone on +44(0) 1865 655342.