## Endobase Quick Reference Guide
# 1.0 Endobase Workflow Guide - Abridged

### Selecting a Patient and Performing a Case

**1** **Patient & Procedural data** will be added into the **Scheduler (home page)** either automatically from your Hospital Information System or can be manually populated. This can be done by:

   a.  **Adding the patient** in the **"Patient list"** tab and then the procedure in the **"Examination data"** tab. Alternatively, patient and procedure details can be added directly from the scheduler by clicking the **"Add New"** button in the bottom left. Begin by checking whether the patient exists in the database by first entering the **Patient ID**. If the patient exists, other demographic data will populate automatically and only the procedure info will need to be added.

   b.  Refer to the quick reference guides **"Endobase Overview"**, **"Add a new Patient"** and **"Schedule an Exam"** for more information.

**2** **In the Scheduler, click the correct patient and procedure** from the list so that it becomes highlighted.

**3** Click on the **Perform Examination** tab to connect Endobase to the Endoscope Processor. *When connected the scope model and serial number will be visible*.

### For Colonoscopy Milestones:

   a.  **Click on milestones** to capture insertion & withdrawal times as per below:

      ii.  Click **"Start(COL)"** on insertion

      iii.  Press **"Withdrawal"** when the scope will be withdrawn

      iv.  Press **pause** when stopping to remove significant polyps.

      v.  Press **"End(COL)"** when scope has been fully withdrawn.

   *Speak to your Sales Specialist about programming scope buttons.*

**4** **At the end of the case**, click **"End"** & then click on the **Post Examination Tab**.

For complete product details see Instructions for Use.

## Selecting Images for your Report

**1** **Click & drag photos** you wish to appear in the report to the grey boxes. (You only need to drag the photo to the closest box).

**2** Images can be **annotated by clicking** the text field under grey box.

**3** **Images can be marked-up** with text and graphics by double clicking the image in the bottom strip.

**4** **To add Anatomical Graphics**, click the **Graphic/Lab Requests** button. Drag the selected images to location on anatomical graphic. You can change the default graphic by clicking **"Select Graphic"**.

**5** Once all images, graphics and mark-ups have been selected and performed, press the **Integrated Reporting" tab** to begin reporting. **If you click "yes" to "setting exam as performed", no further images can be added.**
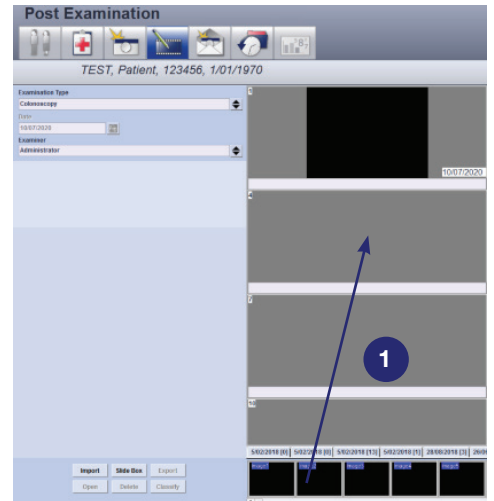
## Building the Report

**1** You should now be in the **"Integrated Reporting"** Module.

**2** Build the report by **clicking through each tab**, from **left to right** populating the terms for that tab.

**3** **Click on the terms** in the left pane to see if any other options like size, location, are available. Some of the **parent terms** may have **sub-terms** which can be expanded by clicking the "+" icon.

Free Text - Available at the base of the list of terms. Double click & then click in the box to add text.

**Please note:** Free text is NOT auditable so please avoid, if possible. Endobase has a comprehensive selection of clinical terminaology so please familarise yourself with where the terms can be found. Additional terms can be added as required by contacting Olympus Endobase support.
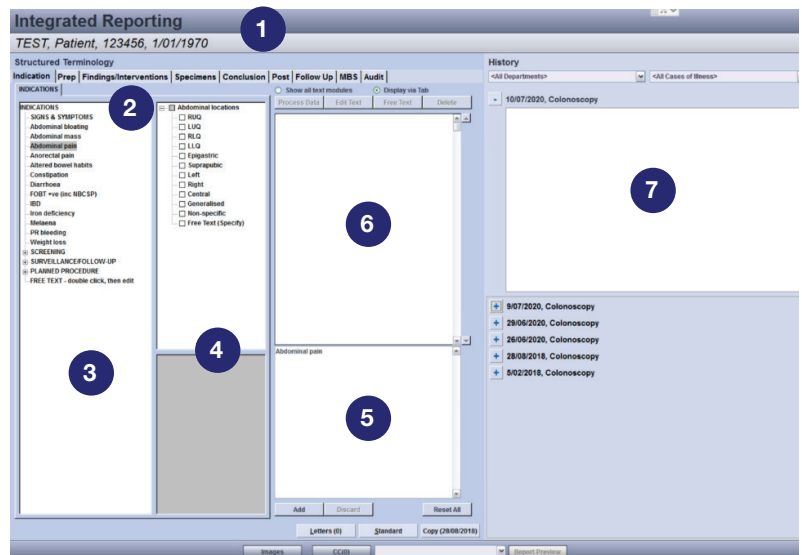
**4** **Attributes and Sub-attributes** are used to describe anatomical locations and more descriptive terms making lists easier to navigate to indicate what was found, where it was found and what was performed.

Any mandatory terms, attributes, and sub-attributes will be highlighted in **Red**.

**5** When a term, attribute and/or sub-attribute is selected, **a preview of the sentence block** generated will be displayed in the **preview pane**. Click "Add" to add this sentence block. To add a term directly, you can also double-click as a shortcut.

**6** **Added sentence blocks** will be shown in the **sentence block pane** for that particular tab.

**7** The **report builder** pane shows a **working preview** of the report as it's getting built.

**8** **Complete subsequent tabs** from Indication to Findings to Follow up using the above steps. The Audit tabs can be setup and customised for your facility as required. Headings in **Green** indicate that data has been populated for that tab and terms.

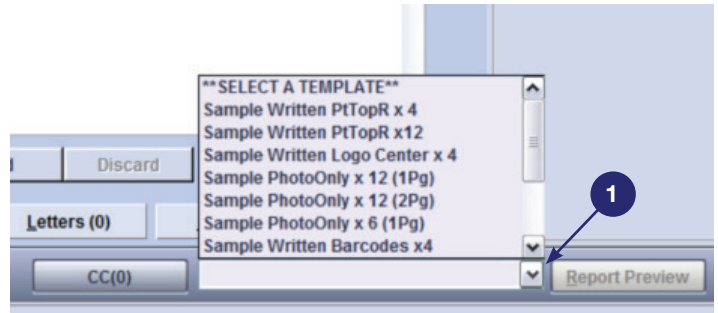For complete product details see Instructions for Use.

## Finalising & Printing the Report

**1** Once the report has been completed, **click on the down arrow** next to the Report Editor.

**2** **Select the required Report Template**
For Example:
- Dr or Hospital Report 1Pg 4Ph
- Dr or Hospital Report 2Pg 12Ph



**3** Click **Report Preview/Editor**. You will now see your report in text for review. Manual Editing from this screen is possible, but this information <u>will not be captured for any audits</u>.

**4** Once report has been checked, press on **"Print"** when ready to finalise.
- Printing the report will **create a PDF**.
- Report PDF's can be found in the desktop folder ENDOBASE REPORTS.

**5** You will now be directed back to the **"Scheduler"** home screen so the next examination can be selected.

OLYMPUS **CONTINUUM**

Endobase Quick Reference Guide
# 1.1 Endobase Overview and Using the Scheduler

## Endobase Modules

**1** **Patient List**

Allows you to create and edit patient details in the database.

**2** **Add new Examination**

Add an examination for the selected patient by entering in the relevant details.

Mandatory fields are highlighted in **Red**.

**3** **Perform Examination**

Connects EB computer to the Endoscope processor to capture images, record video, capture procedural milestones (e.g. Withdrawal time). *Processor/light source needs to be turned on and connected before entering this step and then turned off after completing procedure.*

**4** **Post Examination**

Select, annotate and mark procedural images for your report, edit videos, add anatomical graphics to show where images/ pathology was taken, compare images with historical images and export images and videos to a file location.

**5** **Integrated Reporting**

Using "structured terminology" (dictionary of clinical terms), construct your comprehensive and auditable report minimising free text entry. Final reports can be previewed and generated in this step. *Can also pre-populate reports by using standard templates.*

For complete product details see Instructions for Use.
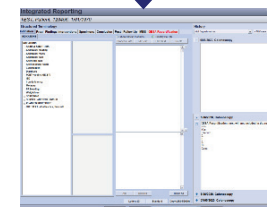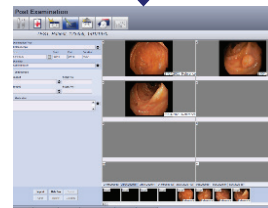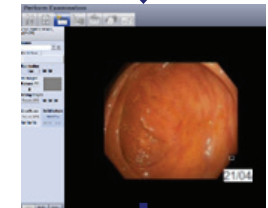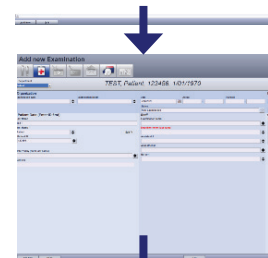
## Using the Scheduler
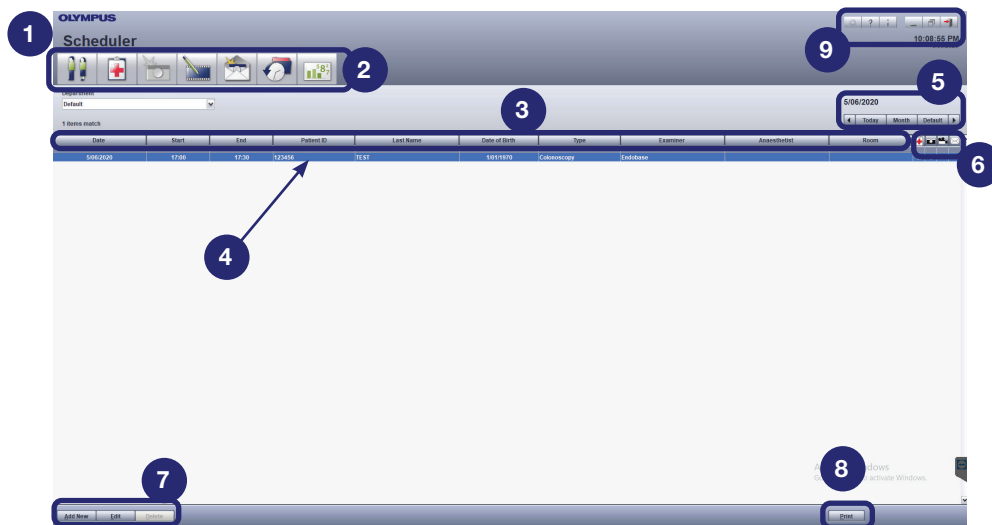


**1** The **Scheduler** screen is the **home screen** of Endobase.

**2** Navigate Endobase by clicking on the **module icons** to complete the modules from left to right.

**3** **Scheduler Column Header** show the information most relevant for your procedural list (can be customised).
  • By clicking on the column header, a **filter** can be set for that column.
  • Under the column header, the grey bar can be clicked to **sort** the column data.
  *Be careful to notice any column filters when looking for a procedure. This column will be highlighted in **Blue**.*

**4** The **current** patient and procedure can be selected by clicking on that line so that it becomes **highlighted**.

**5** **List Date** displays the selected date for the procedural list. With the L/L arrows, toggle 1 day back and forth (i.e. to create a list for future date) or go to a specific day by clicking Month or **click Today to return back to today's list**. *Always check you are on the correct date*.

**6** **Status indicators** show whether a procedure has been created, how many images or videos have been captured and if a report has been created & printed.

**7** **Patient Admin bar** – Can create, edit and delete patients and procedures.

**8** **Print Button** allows you to print the populated list for the selected day.

**9** **App buttons** allow settings to be changed (dependent on admin privileges), access version info, app window resizing and exiting the application in the top right.

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For complete product details see Instructions for Use.

## Endobase Quick Reference Guide
# 2.1 Adding a new patient

### Method 1 - Patient List

**1** From the scheduler screen, click the **"Patient List"** module button on the top left of screen.

**2** Click on the **"Add New"** button in the bottom left to bring up the added new patient window.



**3** Enter all relevant Patient details.

Mandatory fields are displayed in **Red** and can be customised as required with Endobase support.

<u>Note:</u> DOB will need to be entered as DD/MM/YYYY.

**4** Click the **"OK"** button in the bottom right of the screen.

**5** Your patient should now appear in the patient list.



### Method 2 - Scheduler

**1** Alternatively, you can also add a patient from the **"Scheduler"** screen by clicking **"Add New"** in the bottom left. This will bring up the **"Add new Examination"** screen.

**2** Begin entering the patient details with patent ID first. If the software detects this patient does not already exist, an "Add new Patient" window will pop up. Enter Details and then click "OK".



For complete product details see Instructions for Use.

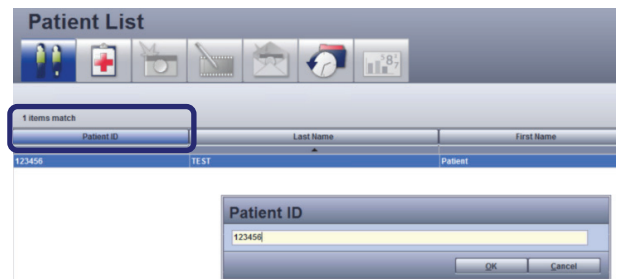# 2.2 Finding and Editing Patient Details

**1** From the scheduler screen, click the **"Patient List"** module button on the top left of screen.

**2** Click on the **"Patient ID"** column and enter Patient ID.

**3** The unique Patient ID will bring up the matching patient.

**4** With correct patient highlighted, patient details can be edited by **clicking the "Edit" button** towards the button left of the "Patient List" screen.

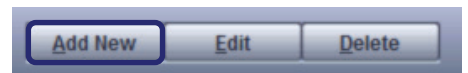**5** Enter new details and **click "OK"** once updated.

For complete product details see Instructions for Use.

## Endobase Quick Reference Guide
# 2.3 Scheduling an Examination

**1** In the scheduler (home) screen, click the **"Add New"** button in the bottom left of the screen to bring up the **"Add New Examination" screen**.

Alternatively, you can create a patient in the **"Patient List" module** and then proceed to the **"Examination Data" module** to create a **new Exam** for that patient.

**2** Enter **Patient ID** to see if the patient already exists in the database.

<u>If the patient exists in the database</u>, the other details (last name, first name, DOB and any other details detected for that patient) will auto-populate.

<u>If the patient does not exist in the database</u>, an **"Add new Patient"** window will pop up to create a patient record before the examination details for this patient can be entered.

**3** Enter all relevant Examination details for the patient such as the **Examination type, Examiner and the Planned start time of the case**.

Mandatory fields can be customised and are displayed in **Red** such as Examination type and the Examiner which are set as mandatory by default.

<u>Note:</u> Exam teams are default combinations of Staff, which can be selected to populate all members of the team if certain members will always be working with each other.

**4** If further examinations need to be added to the list, **click the "Add New" button in the bottom left**, which will add the current examination to the list so that further examinations can be added.

If no more examinations are to be added, **click the "OK" button to return to the Schedule**r

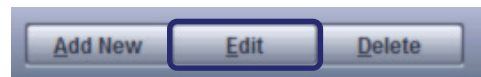For complete product details see Instructions for Use.

Endobase Quick Reference Guide
# 2.4 Editing or Deleting an Examination

## To Edit an Examination

**1** In the **scheduler (home) screen**, click on the examination you wish to edit so it becomes highlighted.

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**2** Click on the **"Edit"** button to bring up the **"Edit Examination" window**.



**3** Enter the new examination details and click **"OK"** in the bottom right of the window to complete the edit and return to the **Scheduler**.



## To Delete an Examination

**1** In the **Scheduler home screen**, click on the examination to be deleted so it becomes highlighted.

**2** Click the **"Delete" button** in the bottom left.

**3** A confirmation box asking if "Do you really want to delete this examination?" will pop up. Click **"OK" to delete**.



For complete product details see Instructions for Use.

# OLYMPUS®
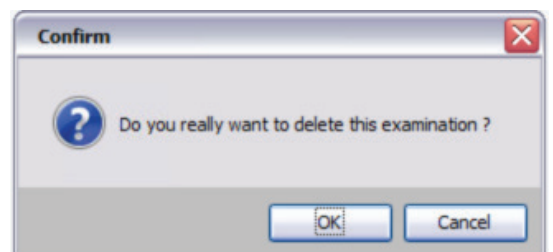
## Endobase Quick Reference Guide
# 2.5 Accessing Patient History

**1** From the **scheduler screen**, click on the "Patient List" Module button in top left.



**2** Click on the **"Patient ID" column** and enter Patient ID and click **"OK"**. This will bring up the matching patient record for that patient.



**3** Click on the **"Patient History" Module button**.



**4** A window with the Patient History will pop up. Click on the procedure relevant for that patient to get further details.

**5** Click the **+/- button** to expand and collapse the list to show all examinations, images, videos and reports for the patient.

**6** Reports can be viewed by clicking on **the envelope** in the expanded list under an examination and then clicking the **"view" button**.

**7** Additional notes can be added for an examination by clicking the **"Add" button** and filling out the **"subject"** and **"author" of the note**.
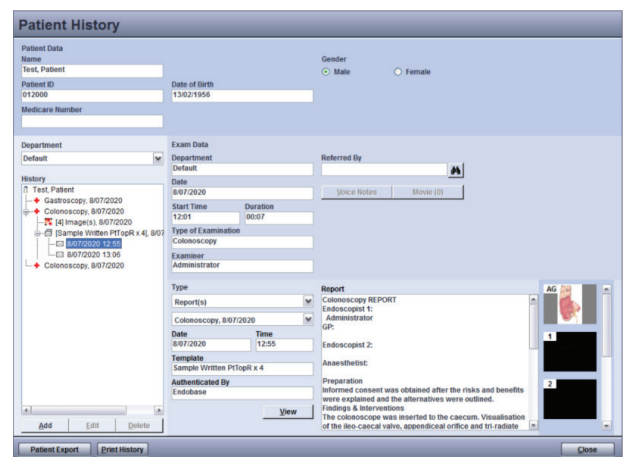


For complete product details see Instructions for Use.

### Endobase Quick Reference Guide
# 3.1 Capturing Images and Video

**1** Click the **"Perform Examination" screen**.

**2** If the connection is successful, the selected scope and serial number will be visible on the left side of screen.

**3** Press the **"Start" button** when exam starts.

Top Tips
- Only press start when procedure starts to accurately record procedure length. (Important for measuring milestones)
- If start is not pressed, the video will connect at the taking of the 1st picture and will start the exam.

**4** **To take images**, the user can either:
a. Press the **designated button on the Olympus scope/camera head** (normally button 4).
b. Click on the **"Still Images" Release button** from within the Perform Examination page in Endobase.
c. Press **F4** on the Endobase computer keyboard.

**5** **To record video**:
a. Click on the **"Moving Images" Record button** from within the Perform Examination page in Endobase.
b. Press **F5** on the Endobase computer keyboard.

**6** **To END procedure**, click **STOP** and move to the next module called Post Examination.





For complete product details see Instructions for Use.
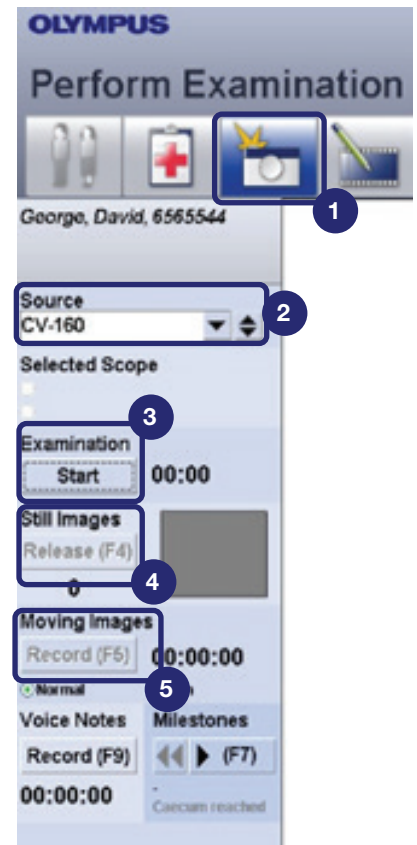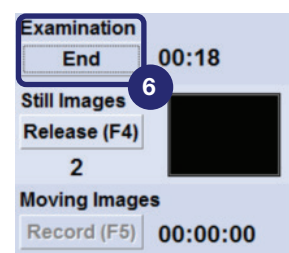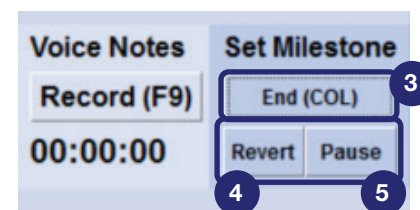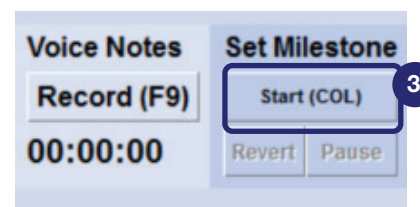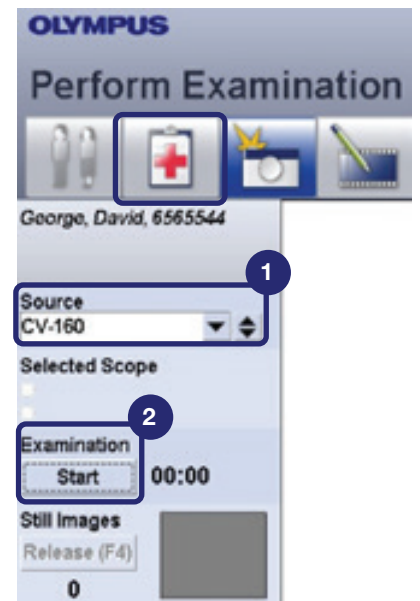
Endobase Quick Reference Guide
# 3.2 Recording Procedural Milestones

Milestones allow you to capture key time intervals such as the procedure time and withdrawal time and can be audited or displayed in your report.

**1** With the processor connected, in the **"Perform Examination" module**, check to see Selected Scope s/n scope to ensure connection,

**2** Under the **"Examination Heading"** click **"Start"** to begin procedure.

**3** Under the **"Set Milestone"** heading, click the below buttons at the apprpriate time indicated below (these can also be customised if more milestones are required).

**Start** - insertion of scope

**Withdraw** - caecum reached and withdrawal begins

**End** - withdrawl complete

**4** The **"Pause"** button allows you to pause the calculation of the milstone duration (e.g. If a polyp was found).

**5** The **"Revert"** button allows you to recalculate a milestone from the beginning or move to a previous milestone.

**6** After the last milestone has been recorded, click **"end"** under the **"Examination" heading** to end the procedure and store the duration of the procedure.

For complete product details see Instructions for Use.

# Endobase Quick Reference Guide
# 4.1 Selecting and Annotating Images

**OLYMPUS CONTINUUM**

**1** Click the **"Post Examination"** Module.

**2** A max of 8 images will appear in the "film strip" at the bottom by default. If a greater number of images were taken, scroll through the film strip by clicking the scrollbar arrow on the right.

**3** **To select images for the final report, drag and drop** the image from the film-strip into the grey boxes in the order of how you want them to be displayed in the report.

*For a standard 1 page report, 4 images is the default. If more images are to be selected, this will require a multi-page report template.*

**4** **Annotations** for the images can be added by entering text in the field below each selected image or by **"enhancing" the images** via the next step.

**5** **To apply mark-ups** to the image, **double-click on any image** in the film-strip to add any shapes or annotations to that image which will bring up the **"enhance" window**.

**6** Here any **shapes and text fields can be added** to the image. If they are to be included in the report select the checkbox **"Insert into report"**.

**7** After completing all enhancements, click the **"close" button** and this will update the image in both the grey boxes and film-strip for inclusion in the report.
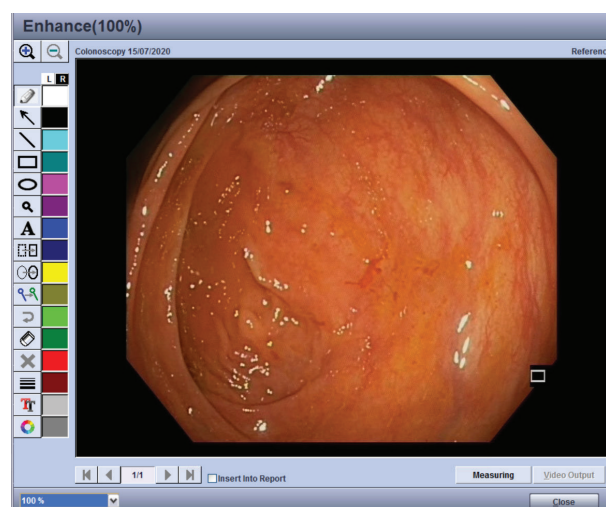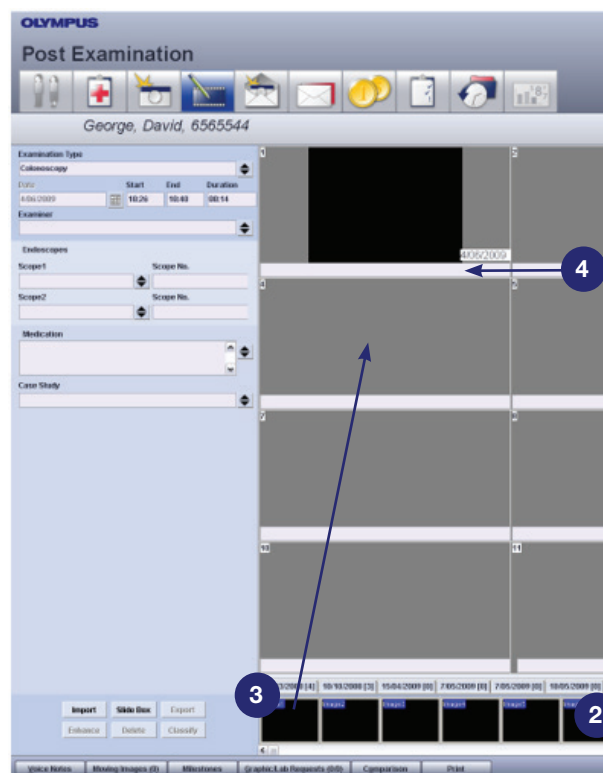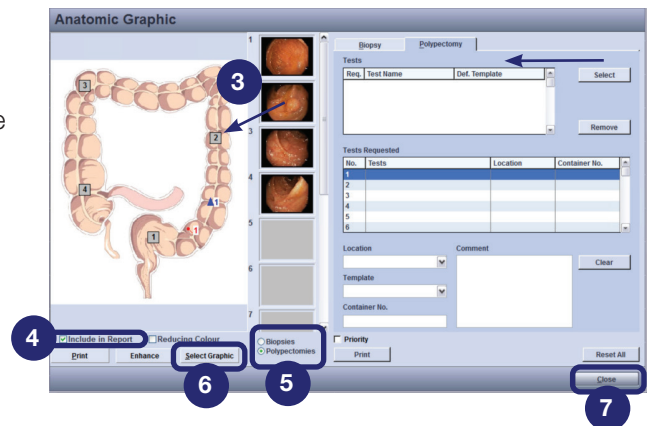
For complete product details see Instructions for Use.

Endobase Quick Reference Guide
# 4.2 Adding Anatomical Graphics

**1** In the **"Post Examination"** Module, ensure all images have been selected by dragging them from the film-strip onto the grey boxes

**2** To add **Anatomical Graphics**, click the **"Graphic/ Lab Requests" button** on the bottom of the screen.
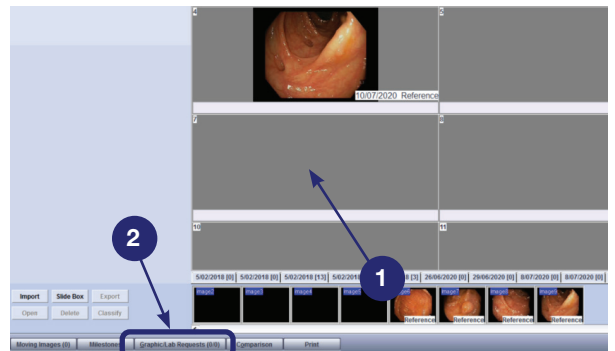


**3** From selected images, drag and drop each of the selected images to the appropriate location on the anatomy. This will create a number marker.

To remove a number marker, drag the marker outside of the anatomical graphic pane.

**4** Ensure the **checkbox "Include in report" is selected** to ensure the graphic will be visible in the report.



**5** **To add location of biopsies or polypectomies**, click the checkbox and then click the appropriate location on the graphic.

**6** To default graphic is selected based on procedure type. To view other graphic options, click the **"Select Graphic"** option.

**7** After all graphics have been selected, click the **"Close" button** in the bottom right to return to the Post Examination module.

For complete product details see Instructions for Use.

Endobase Quick Reference Guide
# 4.3 Exporting Images and Video



## Exporting Images

**1**    Go to the **"Post Examination" Module**.

**2**    To export an image, **click on an image in the "Film Strip"** so it becomes highlighted.

**3**    Now press the **"Export" button** and select you destination drive.

## Exporting Video

**4**    To export a video, press the **"Moving Images" button**.

**5**    Now click the video file so it becomes highlighted and press the **"Export" button** and select you destination drive.

**Please note**: Export of any sensitive patient data will need to be in accordance with your organisation and patient data privacy policies

For complete product details see Instructions for Use.

Endobase Quick Reference Guide
# 4.4 Editing and Viewing Videos

**1** In the **"Post Examination " Module**, click on the moving images button.

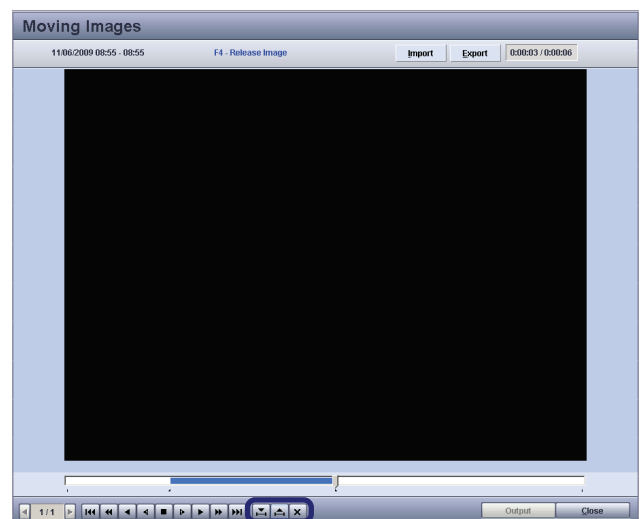| Voice Notes | Moving Images (0) | Milestones | Graphic/Lab Requests (0/0) | Comparison | Print |
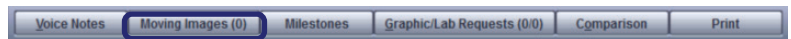
**2** In the **"Movie Selection" window**, press **"Edit" to launch the Moving images screen** where you will be able to view and edit the recorded video.
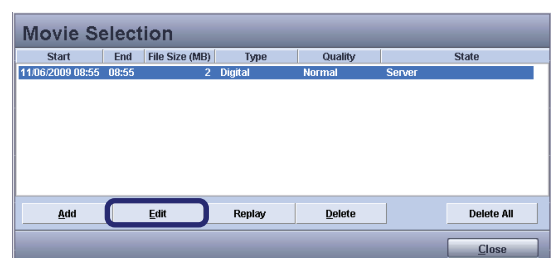
To import other vidoes, click the **"Add" button to import**. To delete the captured video, click the **"Delete" button**.

**Movie Selection**

| Start | End | File Size (MB) | Type | Quality | State |
|---|---|---|---|---|---|
| 11/06/2009 08:55 | 08:55 | 2 | Digital | Normal | Server |

| Add | Edit | Replay | Delete | Delete All |

Close

**3** The video can be edited by selecting sections of the video to deleted. This can be done by setting the start and endpoints.

The **"Start" mark** is denoted by the down arrow 🔽 and the **"End" mark** is denoted by the upward arrow 🔼

**Moving Images**

11/06/2009 08:55 - 08:55    F4 - Release Image    Import    Export    0:00:03 / 0:00:06

| 1/1 | ⏮ ◀◀ ◀ ◀ ■ ▶ ▶ ▶▶ ⏭ 🔽 🔼 × | Output | Close |

**4** After setting the start and end points for the segment to be deleted, click the ❌ **button** to delete the selected segment.

**5** Click close to save the video in the database.

**6** The video can be accessed at a later stage, by first selecting the correct patient via the **"Patient List" Module** and then going to the **"Patient History" Module** to see all the examination data under that patient.

Please refer to the "**Accessing Patient History" Module** to see all the examination data under that patient. Please refer to the **"Acessing Patient History"** quick reference guide for more information.

For complete product details see Instructions for Use.

Endobase Quick Reference Guide
# 5.1 Creating a Report using Terminology

**1** From the **"Post Examination" module**, click on the **"Integrated Reporting"** icon.

**2** The software will prompt whether you would like to set examination as performed. Click "Yes" if you do not wish to add any further images, or "No" if you would like the option of adding further images. To generate the final report, the exam must be set to performed.
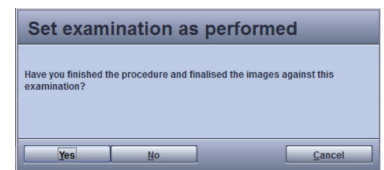
**3** **Create the report** by clicking through each tab, from left to right populating the terms for that tab.

**4** Click on the terms in the left pane to see if any other options like size, location, are available. Some of the **parent terms** may have **sub-terms** which can be expanded by clicking the "+" icon.

**5** **Attributes and Sub-attributes** are used to describe anatomical locations and more descriptive terms making lists easier to navigate to indicate what was found, where it was found and what was performed. Any mandatory terms, attributes, and sub-attributes will be highlighted in **Red**.

**6** When a term, attribute and/or sub-attribute is selected, **a preview of the sentence block** generated will be displayed in the **preview pane**. Click **"Add"** to add this sentence block. To add a term directly, you can also double-click as a shortcut.

**7** Added sentence blocks will be shown in the sentence block pane for that particular tab.

**8** The **report builder** pane shows a **working preview of the report** as it's getting built.

**9** **Previous patient examinations** can be viewed here by clicking and expanding the **"+" button**.
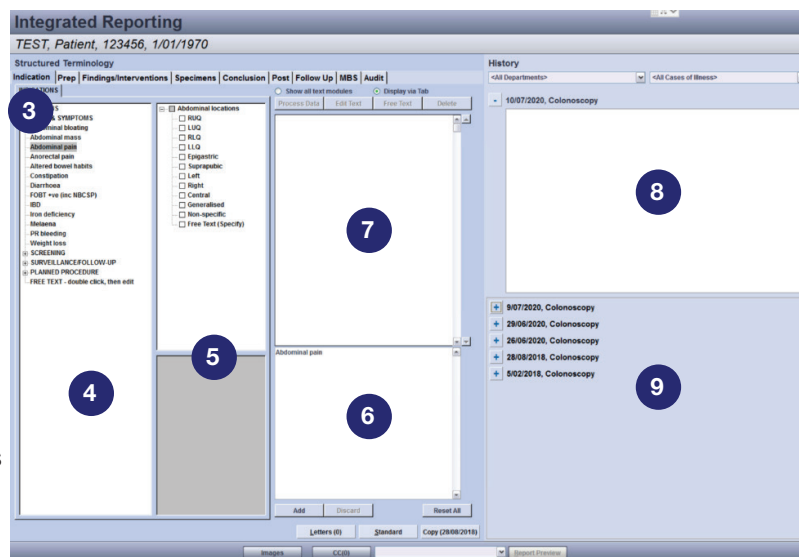
For complete product details see Instructions for Use.

**10** **Complete subsequent tabs** from Indication to Findings to Follow up. The **Audit tabs** can be setup and customised for your facility as required. Headings in **Green** indicate that data has been populated for that tab and terms.
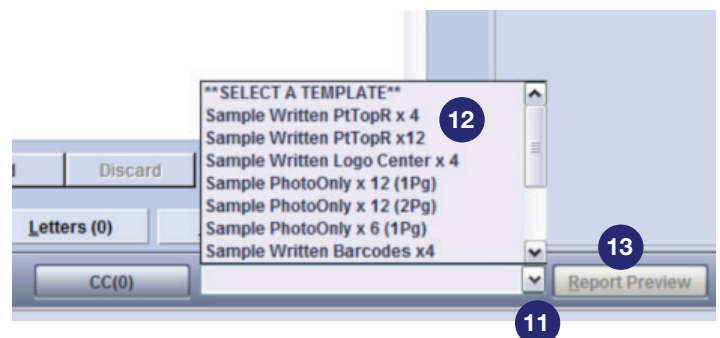
Structured Terminology
Indication | Prep | Findings Interventions | Specimens | Conclusion | Post | Follow Up | MBS |

**11** Once the report has been completed, **click on the drop down arrow next to Report Editor**.

**12** **Select the required Report Template**
For Example:
• Dr or Hospital Report 1Pg 4Ph
• Dr or Hospital Report 2Pg 12Ph

**13** Then press **Report Preview**. You will now see your report in text for review. Manual Editing from this screen is possible, but this information will not be captured for any audits.

Discard

Letters (0)

CC(0)

**12**
**\*\*SELECT A TEMPLATE\*\***
Sample Written PtTopR x 4
Sample Written PtTopR x12
Sample Written Logo Center x 4
Sample PhotoOnly x 12 (1Pg)
Sample PhotoOnly x 12 (2Pg)
Sample PhotoOnly x 6 (1Pg)
Sample Written Barcodes x4

**13**
Report Preview

**11**

**14** Once report has been checked, press on **"Print"** when ready to finalise.
• Printing the report will **create a PDF**.
• Report PDF's can be found in the desktop folder ENDOBASE REPORTS.
• If you have Secure Messaging, Pressing Print will send the PDF electronically.

**15** You will now be directed back to the **"Scheduler"** home screen so the next examination can be selected.

For complete product details see Instructions for Use.

# OLYMPUS®

OLYMPUS **CONTINUUM**

Endobase Quick Reference Guide
# 5.2 Pre-fill a report using standard templates

## Standard templates

Standard templates can be used to pre-fill the report with text. This feature is particularly effective for routine procedures which may not have many significant findings.
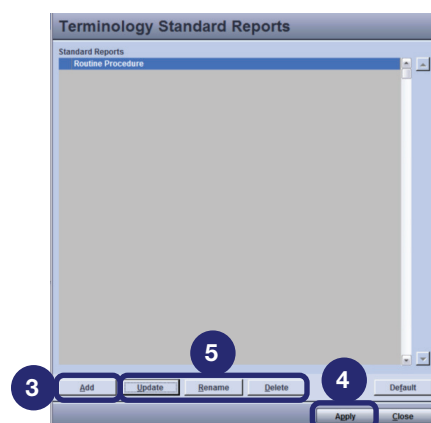
## Creating a standard template

**1** To begin creating a standard template, first populate the report how you would like it to appear in the template.

**2** Click the **"Standard"** button towards the bottom of the screen.

**3** In the standard template screen, to add the current report as a standard template, select **"Add" and name the template**. This template will now be saved for future use.
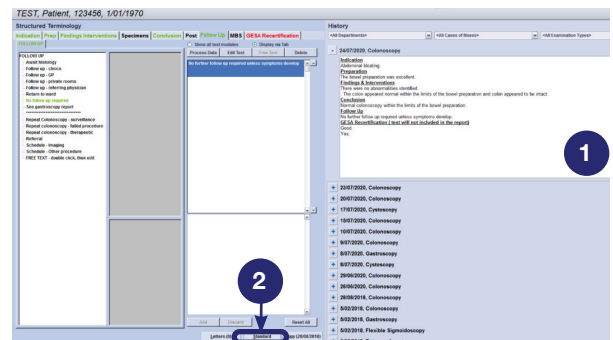


## Applying a standard template

**4** To select a previously created standard template to apply to the current report, select the report from the list and then click **"Apply"**. If any text is already present in the report this will be overwritten when clicking **"Yes"**.

**5** Standard reports can also be updated, renamed or deleted by clicking the relevant button in the standard template window.



For complete product details see Instructions for Use.