

# Otocloud

## User Guide

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**Technical support**

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# 1 Overview

Otocloud is a web application that gives you online access to your scans and enables you to create and send online orders to manufacturers of hearing aids and/or ear molds.

# 2 Intended use

## Use

Easy exchange of scan files and order details between clinic and manufacturer.

## Users

Audiologists and administrators at the hearing aid clinics who need to make orders for hearing aids.

# 3 About this manual

## The use of Warning, Caution and Note

To draw your attention to information regarding safe and appropriate use of the device or software, the manual uses precautionary statements as follows:

**Warning** • Indicates that there is a risk of death or serious injury to the user or patient.

**Caution** • Indicates that there is a risk of injury to the user or patient or risk of damage to data or the device.

**Note** • Indicates that you should take special notice.

## Navigation

Menus, icons and functions to select are shown in bold type, as for instance in:

- Click the **Home** icon on the top bar.



## 4 Installation

Otocloud is not installed on your computer, as it is a web application. However, Otocloud can be accessed using the web browser on any computer.

The computer requires access to the internet and it is recommended to use the Chrome browser provided by Google. Follow the below instructions or visit Google support for further instructions at <https://support.google.com/>.

### 4.1 Internet access

Please ask your local IT support for details on how to access the Internet.

### 4.2 Installing Google Chrome

To install Chrome for your user account, follow the steps below:

1. Download the installer file for the Windows operating system on your computer from <https://google.com/chrome/>.
2. If prompted, click **Run** or **Save**.
3. If you have chosen to save the installer, locate the file **ChromeSetup.exe** in your default download folder, usually named **Downloads**.
4. Double-click the installer file to start the installation process and follow the instructions on the screen.

**Note** • This instruction refers to an external application, so details in the procedure may deviate from the above-mentioned steps. Follow current instructions from the manufacturer.

## 5 Accessing Otocloud

### For administrators

When your company or clinic has been granted access to the Otocloud application, the appointed primary administrator at your premises will receive a system-generated email with authorization to define a password. The email contains information about the User name and a link to the **Login** screen.

Information about how to delegate access to other users is found in the section [Administration ► 20](#).

### For other users

Contact the Otoscan administrator at your premises to apply for access to the system. When you have been granted access, the system will automatically send you an invitation and further instruction of how to define a password and log into Otocloud. Your e-mail address will be used as user name.

### Accessing Otocloud

You can open Otocloud in your web browser. Alternatively, if you are using an Otoscan PC, access Otocloud via Session Manager.

To open Otocloud directly in the web browser:

1. Open your browser and enter the web address <https://otocloud.earscanning.com/> in the address field.

2. Press **Enter** to continue.
- For easy return to this site it is recommended to bookmark the URL in the browser or to set it as the preferred homepage. See [Bookmarking Otocloud ► 6](#) or [Setting Otocloud as the preferred homepage at start-up ► 6](#).
3. To log into Otocloud, enter your user name and password at the **Login** screen and click **Login**.

## 5.1 Bookmarking Otocloud

1. Open the browser and enter the Otocloud web address in the browser: <https://otocloud.earscanning.com/>.
2. Click the **star** in the right-hand end of the address bar.
3. Select to store the bookmark in the bookmarks bar.
4. Finally, select to always show the bookmarks bar by selecting **Customize and Control Google Chrome > Bookmarks > Show bookmarks bar**.

**Note** • This instruction refers to an external application, so details in the procedure may deviate from the above-mentioned steps. Follow current instructions from the manufacturer.

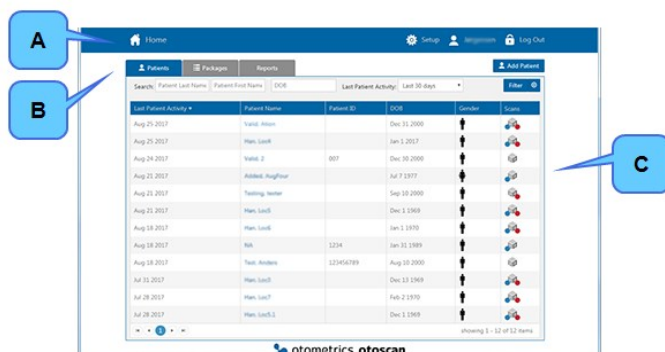
## 5.2 Setting Otocloud as the preferred homepage at start-up

1. Open the Chrome browser.
2. Select **Settings** (possibly indicated by three vertical dots, placed to the right of the address/search bar).
3. Look for the option **On startup** and add the Otocloud web address as new page.

**Note** • This instruction refers to an external application, so details in the procedure may deviate from the above-mentioned steps. Follow current instructions from the manufacturer.

# 6 Using Otocloud

The Otocloud web application works in the same way as other web pages: You click any selectable item once in order to select it.



**Fig. 1** The OtocloudHome page.

- A.** Home.
- B.** Navigation section.
- C.** Work area.

The main areas of the OtocloudHome page are:

- A.** The **Home** function on the top bar. From any point in the program, click **Home** to return to the **Home** screen, that is, the **Patients** list.
- B.** The navigation section. Here you select the main tasks:
  - **Patients** View patient data and prepare to send a package: See [Managing patient data](#) ► 7.
  - **Packages**: View saved or sent order packages. See [Package management](#) ► 15.
  - **Reports**: Create reports related to system or orders. See [Reporting](#) ► 17.



To the right of the main task tabs you find the **Add Patient** button. See [Adding a new patient](#) ► 9

- C.** The work area of the main tasks. At the top you find a search section that works by means of filters. See [The Patient list](#) ► 8. The result of the current search is displayed in the work area below the search section. For each patient the icons to the right indicate the gender of the patient, and whether or not scans exist for right ear (red dot) and left ear (blue dot) respectively.

## 7 Managing patient data

Otoscan Session Manager and Otocloud store all patient data and saved scans in mutually synchronized patient records.

It is good practice to check if a patient is already in the database, before you create a new patient record.

This description covers Otocloud. For instructions on how to work with patient records within Session Manager, see the Otoscan User Guide.

### Opening or adding a patient record in Otocloud

- See [Viewing patient details](#) ► 9.
- If no record exists for the current patient, create one. See [Adding a new patient](#) ► 9.

For information on how to work with patient records in Session Manager, see the Otoscan User Guide.

### More options

- Editing a patient record: See [The Patient list](#) ► 8.
- Deleting a patient record: See [The Patient list](#) ► 8.

## 7.1 The Patient list

### Opening a patient record

When you open Otocloud, the **Patients** tab is displayed.

To find an existing patient record in the **Patient list**, you can either use search filters or sort the list by the column headers.

### Using filters to search for a patient

1. If the patient list is long, use the filter selections above the list to search for the patient:

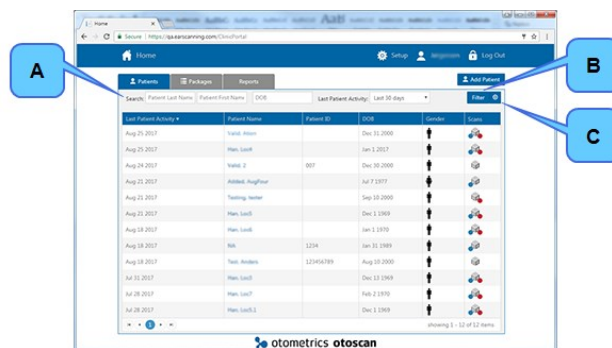


Fig. 2 The Patient list

- A. Search fields.
- B. The **Filter** button.
- C. The **Clear Filter** button.

- A. Enter either the patient's name, ID, Date of Birth, or date of last activity in the corresponding fields.
  - B. Click the **Filter** button to activate your search.
  - C. If you need to reset the filter in order to make a new search, click the button **Clear Filter**. The button is located to the right of the **Filter** button.
2. When the patient is found, click the patient name in the **Patient Name** column to open the record.

### Using column headers to sort the list of patient records

You can click one of the column headers to have the list sorted according to the selected column:

- The first click on a column header will sort the list in ascending order.
- A second click on the column header will reverse the sorting order.

An arrowhead next to the column name will indicate that this column was used for sorting. If the arrowhead points upward, the sorting is in ascending order; if it points downward, the sorting is in descending order.

### Editing a patient record

If you need to make changes to a patient record:

1. Open the relevant patient record from the **Patient list**.
2. In the top left corner, click the **Edit Patient** icon.
3. Make the required changes.
4. Click **Save** to save your changes, or **Cancel** to quit without making changes.  
You will be returned to the patient record window.



### Closing a patient record

- To close a patient record and return to the Patient List, click the **Home** button in the top left corner of the screen.



## Deleting a patient record

It is not possible to delete a patient record.

## 7.2 Adding a new patient

The **Add Patient** button is available independently of the selected tab.

1. Click the **Add Patient** button to enter a new patient.

The **Add Patient** dialog allows you to enter a predefined set of patient details. The fields marked with an asterisk (\*) are required. You can, however, choose to enter either a patient name or a patient ID.

Use the keyboard Tab key or the computer mouse to navigate between the different fields.

The required fields are:

**Fig. 3** The **Add Patient** dialog box.

- A. **Patient Last Name.** Required if **Patient ID** not specified.
- B. **Patient First Name.** Required if **Patient ID** not specified.
- C. **Date of Birth:** Patient Date of Birth. Required.
- D. **Gender** of patient. Required.
- E. **Patient ID:** Patient identifier. Required if name not specified.

2. After entering at least the required data of the patient, click **Save**.

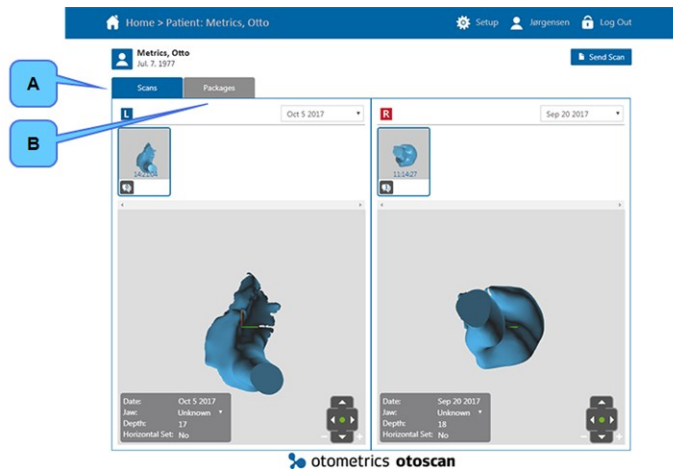
The dialog closes and a new **Patient Details** page opens. The new patient record also appears in Session Manager on your local Otoscan PC, as patient data in Otocloud and Session Manager are synchronized every time Session Manager is online.

- To close the dialog box without adding a new patient, click **Cancel**.

## 7.3 Viewing patient details

When you have selected a patient, the **Patient Details** page for that patient appears.

The **Patient Details** page contains two tabs: **Scans** and **Packages**.



**Fig. 4** The **Patient Details** page.

- A. The **Scans** tab.
- B. The **Packages** tab.

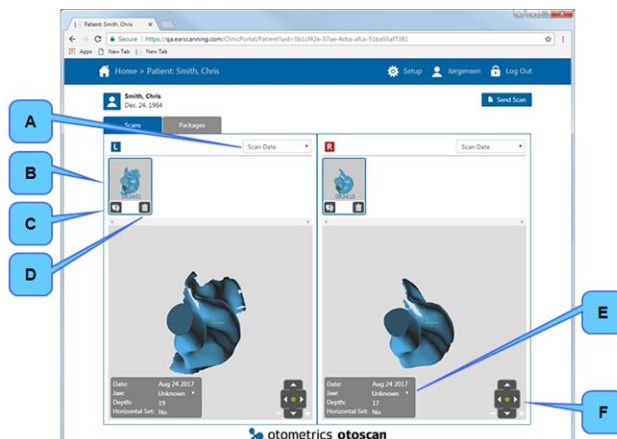
- A. On the **Scans** tab you can manage details of the scans obtained for that patient before you create a scan package to send to a manufacturer.  
The **Scans** tab is described in the section [Managing and sending scans](#) ► 10.
- B. On the **Packages** tab you can view sent packages for the patient.  
For information about the **Packages** tab, see the section [Finding packages via the Patient Details page](#) ► 16.

## 8 Managing and sending scans

### 8.1 Managing scan sessions

The **Scans** tab allows you to view your scan sessions and add annotations to a specific scan. It is available from the **Patient Details** page.

This tab is also the starting point when you want to prepare an order package to send to a manufacturer.



**Fig. 5** The **Patient Details** page with the **Scans** tab selected.

- A. Scan Date:** The sessions are identified by date. If more than one scan is available, they will all be displayed initially. Select **Scan Date** if you only want to see one scan.
- B. Scan selector:** If more scans for one ear is available, click the one for which you want to see details. The 3D file will be loaded in the large field.
- C. Annotation:** Click the **Annotation** icon to add or view annotations. The annotation frame will temporarily cover the field for the opposite ear. Click **New** at the top of the field to add an annotation.  
You can add further details to an annotation. See [Adding Annotations](#) ► 11.  
The number on the **Annotation** icon shows the current number of annotations.
- D. Delete icon:** Delete the selected scan. You will be prompted to confirm that you want to delete. This action will also delete the scan in the OtoscanSession Manager.
- E. Scan details for the currently selected scan:**
- Date:** The date the scan was created.
- Jaw:** Click the **Down Arrow** to indicate the jaw position, if you want to state this information for manufacturing purposes.
- Depth:** The maximum depth (in mm) reached from the ear canal opening.
- Horizontal Set:** Indicates whether or not a horizontal line for placing of directional microphones has been set during the scanning session.
- F. Rotation tools:** Rotate the scan by clicking the arrows or return to the original position by clicking the green dot.

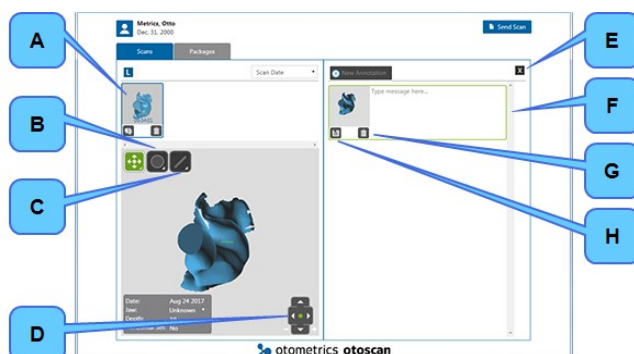
## 8.2 Adding Annotations

As mentioned in [Fig. 5](#) ► 10, you can add annotations to scans.

1. Click the **Annotation** icon to add or view annotations. The annotation frame will temporarily cover the field for the opposite ear.



Earlier annotations will be visible in the annotation field. The number on the icon indicates existing annotations.



**Fig. 6** The **Patient Details** page with the **Annotation** icon selected.

2. Click the **New Annotation** button at the top of the field to add a new annotation.  
A number of extra options for annotating becomes available:

- A. Scan selector: Select the scan that you want to annotate.
- B. Line marker tool: Add a line annotation to the scan.
- C. Ellipse marker tool: Add an ellipse annotation to the scan to identify an area of interest.
- D. Rotation tools: Rotate the scan by clicking the arrows or return to the original position by clicking the green dot.
- E. **Close** icon: Close the annotation dialog. If you have started writing an annotation, this button is inactive until you have either deleted (G) or saved (H) the annotation.
- F. Text field: Write remarks to the scan here. The text must be either deleted (G) or saved (H), before you can close the annotation (E).
- G. **Delete** icon: Delete the annotation.
- H. **Save** icon: Save the annotation.

- Make the needed annotations and click the **Save** icon to save the annotation.
- Click the **Close** icon to close the annotation.

### Deleting an annotation

- To delete an annotation, open the annotation and click the **Delete** icon.
- Confirm that you want to complete this action.

## 8.3 Preparing to send a scan package

- To prepare sending a scan to a manufacturer, open the **Patient Details** page for the patient.
- Click the **Send Scan** button.

The **Send Scan** page opens. Here you can select which scans to send and add all relevant information, including an order form for the manufacturer in question. The latest scan has been pre-selected, but you can select other scans by clicking the **Attach Scan(s)** button.

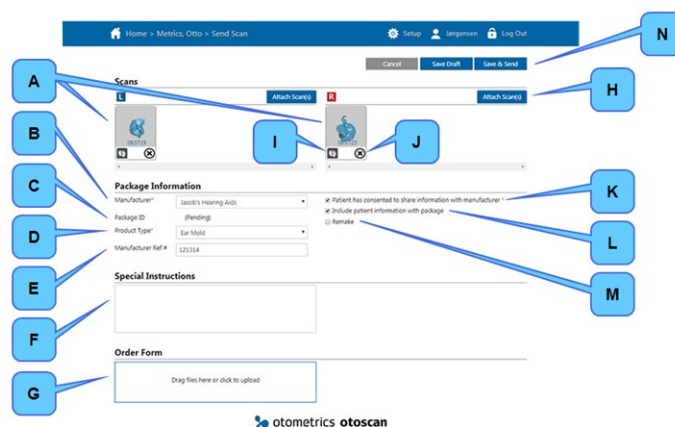


Fig. 7 The **Send Scan** page.

The individual fields and buttons are:

- |   |  |
|---|--|
| A. (Scan image):                        | Currently selected ear scan for left (L) and right (R) ear respectively.   |
| B. <b>Manufacturer name:</b>            | Click the arrow to open a list of available manufacturers. The list is maintained by the clinic's primary Otocloud administrator.  |
| C. <b>Package ID:</b>                   | The package ID uniquely identifies the package to the manufacturer. The package ID is automatically assigned by the system when you save a draft of the package or when saving and sending the package.  |
| D. <b>Product Type:</b>                 | Click the arrow to open a list where you can choose between product types, e.g. hearing aid or ear mold.   |
| E. <b>Manufacturer Ref #:</b>           | If an order has been placed with the manufacturer prior to sending the scans, copy the order reference number from the manufacturer to this field.   |
| F. <b>Special Instructions:</b>         | Enter special instructions to the manufacturer in this text field.   |
| G. <b>Order Form:</b>                   | Use this field to attach an order form to the package. See <a href="#">Different ways to send an order form</a> ► 13.  |
| H. <b>Attach Scan(s):</b>               | The latest scans made have automatically been selected for the scan package. Click to attach another scan.   |
| I. <b>Annotation</b> icon:              | Click to view annotations.   |
| J. <b>Remove</b> icon:                  | Click to remove the selected scan from the scan package.   |
| K. <b>Patient consent confirmation:</b> | The user is responsible for confirming that the patient has consented to share information with the manufacturer. Select the box when consent has been obtained. The <b>Save &amp; Send</b> button is disabled, until this consent has been confirmed. |

**Note** • Patient consent is required under the General Data Protection Regulation (GDPR) that requires businesses to protect the personal data and privacy of EU citizens for transactions that occur within EU member states.

- |  |   |
|--|---|
| L. <b>Include Patient Information:</b>             | Select to add stored patient information (name, date of birth, gender) to the manufacturer package.   |
| M. <b>Remake:</b>                                  | Specify if this is a remake. If selected, a list with previously sent packages will appear.<br>Open the list to select the original package ID for reference. |
| N. <b>Cancel, Save Draft, and Save &amp; Send:</b> | Buttons for management of packages under preparation.   |

3. Make the relevant selections. If you are going to include an order form, do not click **Save & Send** at this point.

## 8.4 Different ways to send an order form

Depending on the chosen manufacturer and product type, Otocloud gives you access to two different ways of sending an order form from the **Package Details** page:

- Sending package from Otocloud and ordering through web shop
- Sending package with attached order form

## Sending package from Otocloud and ordering through web shop

If the manufacturer offers online product ordering through a web shop *and* has configured their web shop in their Otocloud application, do as follows:

1. Prepare your scan package on the **Send Scan** page in Otocloud.
2. After selecting the manufacturer, product type and confirming patient consent, click the **Save & Send** button. Otocloud appends a system-generated package ID to the package and sends it. It is now available for the manufacturer to download.

The **View Package** page opens. It shows the package details including the system-generated Package ID. The ID is shown in the top left corner.

3. Click the **Copy** icon next to the package ID to copy the ID number to the Windows clipboard. You will need it as reference in the web shop.

In the section **Package Information** the manufacturer name appears as a link. This shows that the manufacturer offers web shop access through Otocloud.

4. Click the manufacturer link to open the manufacturer's web shop on a new page.
5. Use the web shop options to send the product order details to the manufacturer.  
Paste the copied package ID as reference to the package. It is important that you always reference the Otoscan Package ID in your order to the manufacturer.

## Sending package with attached order form

Otocloud provides an option to attach an order form to the scan, so that all order information is sent to the manufacturer in the same package. To use this option, do as follows:

1. Prepare your scan package on the **Send Scan** page in Otocloud.
2. Prepare the order form you want to attach. The form may be available on paper, on file, or directly in Otocloud:
  - **Order form on paper:** If the order form from the manufacturer is available on paper, you can choose to fill it in, scan it and save it to a known location on your computer or on a connected drive such as a USB stick. Proceed to step 3 in this procedure.
  - **Order form on file:** If the order form is available on file, fill it in and save it to a known location. Proceed to step 3 in this procedure.
  - **Order form in Otocloud:**

Some manufacturers provide an order form in Otocloud for each of their specific products, containing all the different options for that product.  
When you have selected the manufacturer and product type, the order form section extends with online order forms.

Select and prepare the order form as follows:

1. Select the preferred language and the specific product and click the **Download** button.
2. Open the downloaded order form.
3. Enter your customer details, configure your product and save the order form on your computer.



3. Return to the **Send Scan** page in Otocloud to attach the filled-in order form to the package.
4. Locate the recently saved file using Windows Explorer, and drag and drop it to the designated drop area in Otocloud. Alternatively, click the drop area to open a standard Windows dialog to attach a file.

- If you need to remove the order form again, click the **Remove** icon. The form will be removed from the package. The form file will not be deleted.



5. To finalize the order, click the **Save & Send** button. The package is now available for the manufacturer to download.
6. To see the saved order form at a later stage, go to the the package details page and locate the package ID.

If you choose to send the order details to the manufacturer through other channels, always remember to reference the package ID number provided by Otocloud.

#### Cancel or Save Draft

- If you want to cancel the package preparation without sending or saving, click **Cancel**
- If you want to save a draft of the package that you are preparing, without sending it now, click **Save Draft**. The draft will become available for later editing on the **Packages** tab.

## 9 Package management

You can find sent or saved packages in order to review details for a specific order or patient in two ways:

- On the **Packages** tab.
- By opening the **Patient Details** page from the **Patients** tab.

### 9.1 Finding packages via the Packages tab

All the packages are available from the **Packages** tab , initially sorted by date of creation.

From this tab you can search for the package in two ways:

- By **Patient Name**.
- By **Package ID**.

Further, you can select the date interval within which to search. By default the list will show the packages created during the last month.

- Use filters to change or narrow down the search, or sort by column, in the same way as for the **Patient list**. See [The Patient list](#) ► 8.
- You can use the **Copy** button next to the **Package ID** number to copy the number to the Windows clipboard.



Patient Name	Package ID	Manufacturer	Created Date	Sent Date	Status
Metrick, Otto	Draft	Jacob's Hearing Aids	Sep 5 2017	Draft	Draft
Metrick, Otto	12435-1472453366	Jacob's Hearing Aids	Aug 31 2017	Aug 31 2017	Submitted
neepa, guy	123456789-1242858625	Test Manufacturer A	Aug 29 2017	Aug 29 2017	Downloaded
Han, Lock	Draft	Locahan Ear mold L...	Aug 29 2017	Draft	Draft
Metrick, Otto	007-31437302	Locahan Ear mold L...	Aug 25 2017	Aug 25 2017	Downloaded
Han, Lock	123456789-4741465371	Test Manufacturer A	Aug 25 2017	Aug 25 2017	Submitted
Han, Lock	007-2081756810	Locahan Ear mold L...	Aug 25 2017	Aug 25 2017	Downloaded
Han, Lock	007-2110106391	Locahan Ear mold L...	Aug 25 2017	Aug 25 2017	Downloaded
Han, Lock	007-1972542461	Locahan Ear mold L...	Aug 25 2017	Aug 25 2017	Submitted
Han, Lock	007-411446282	Locahan Ear mold L...	Aug 25 2017	Aug 25 2017	Submitted
Han, Lock	007-496859111	Locahan Ear mold L...	Aug 25 2017	Aug 25 2017	Submitted
Han, Lock	007-111467372	Locahan Ear mold L...	Aug 24 2017	Aug 24 2017	Submitted
Added, Augflor	123456789-1496957846	Test Manufacturer A	Aug 21 2017	Aug 21 2017	Downloaded
Han, Lock	123456789-349995793	Test Manufacturer A	Aug 21 2017	Aug 21 2017	Downloaded
Han, Lock	12987456-2004740609	Sam's Ear Stuff	Aug 21 2017	Aug 21 2017	Submitted

Fig. 8 The Packages tab.

The column furthest to the right indicates the status of the order. An order can be either **Draft**, **Submitted**, or **Downloaded**.

- **Draft** indicates that the package has been partially prepared and saved as a draft.
- **Submitted** indicates that the manufacturer has not yet accepted the order into their order flow.
- **Downloaded** indicates that the manufacturer has accepted the order and downloaded the scans in order to make the ordered product.

## 9.2 Finding packages via the Patient Details page

1. From the **Patient Details** page for a specific patient, click the tab **Packages** to go directly to the complete history of sent packages for that patient.
  2. From the list of sent packages, search for the relevant package. To sort the list by any of the columns click the column header.
- The first click on a column header will sort the list in ascending order.
  - A second click on the column header will reverse the sorting order.

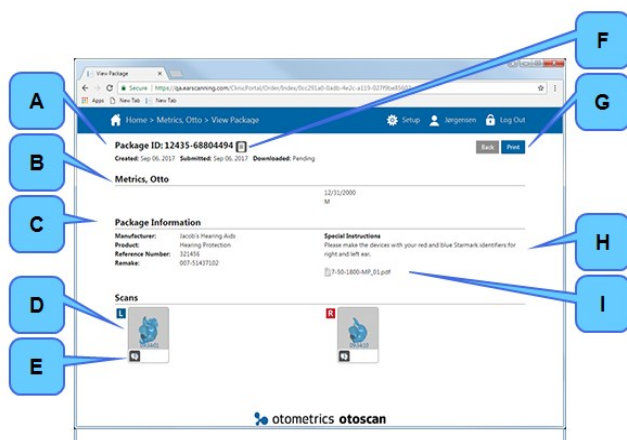
## 9.3 Viewing package details

At any time you can access your drafts or sent packages and view the details.

1. Search for the package See [Finding packages via the Patient Details page](#) ► 16.
2. Click the package ID number to open the **View Package** page.



The **View Package** page contains the following information:



**Fig. 9** The **View Package** page.

- |                                 |  |
|---------------------------------|--|
| <b>A. Package ID:</b>           | Package identity number and status of the package.   |
| <b>B. Patient information:</b>  | Name and other patient information.  |
| <b>C. Package Information:</b>  | Manufacturer and product details. If the manufacturer name is an active link, the manufacturer has connected their web shop to Otocloud.   |
| <b>D. Scans:</b>                | 3D scan file. Click the image to view.   |
| <b>E. Annotation icon:</b>      | Click to see annotations to the scan.  |
| <b>F. Copy icon:</b>            | Click to copy the package ID number to the clipboard.  |
| <b>G. Print button:</b>         | Click to print a copy of the package summary, stored in .pdf format, including any attached order form. If it does not print, look for the file in the <b>Downloads</b> folder on your computer. |
| <b>H. Special Instructions:</b> | Special instructions from the sender of the package.   |
| <b>I. Order form file:</b>      | The filled-in order form, if included. Click to open.  |

## 10 Reporting

A number of reports are available in the application. You can see the reports online or download them as .csv (Comma Separated Values) files for further processing. Depending on your role, different report options are available.

### Reports accessible to users with the role Scanning

- **Order Status**
- **Order Detail**
- **Patient History.**

### Reports accessible to users with the role Reporting

- **User Log**

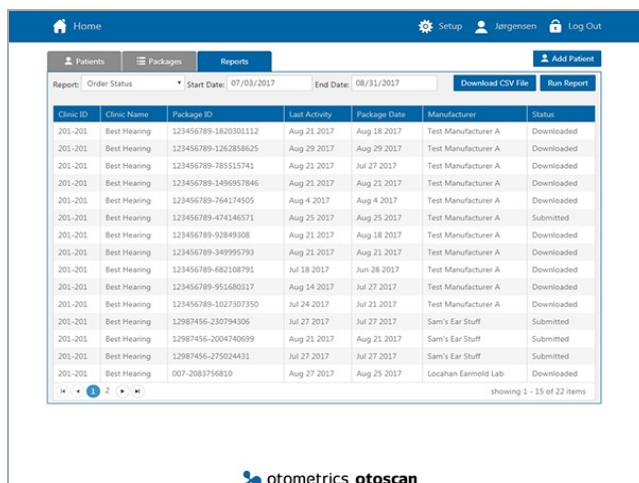
- **Order Status**
- **Order Detail**
- **Patient History.**

#### Reports accessible to the administrator

- **User Overview**
- **User Log**
- **Order Status**
- **Order Detail**
- **Patient History.**

## 10.1 Creating a Report

1. From the Otocloud **Home** page, click the **Reports** tab.
  2. Select the report of your choice, using the drop-down list.
  3. For report types with a **Start Date/End Date** filter, specify a date interval for the report. If dates are not specified, all entries are included in the report.
  4. Click the **Run Report** button to create the report.
- The report is displayed on the screen.



The screenshot shows the 'Reports' tab in the Otometrics Otoscan interface. The 'Report' dropdown is set to 'Order Status'. The date range is from 07/03/2017 to 08/31/2017. The table displays 22 items, showing columns for Clinic ID, Clinic Name, Package ID, Last Activity, Package Date, Manufacturer, and Status. The status of the reports varies, including 'Downloaded' and 'Submitted'.

Clinic ID	Clinic Name	Package ID	Last Activity	Package Date	Manufacturer	Status
201-201	Best Hearing	123456789-1820301112	Aug 21 2017	Aug 18 2017	Test Manufacturer A	Downloaded
201-201	Best Hearing	123456789-1262858625	Aug 29 2017	Aug 29 2017	Test Manufacturer A	Downloaded
201-201	Best Hearing	123456789-785515741	Aug 21 2017	Jul 27 2017	Test Manufacturer A	Downloaded
201-201	Best Hearing	123456789-1496957846	Aug 21 2017	Aug 21 2017	Test Manufacturer A	Downloaded
201-201	Best Hearing	123456789-764174505	Aug 4 2017	Aug 4 2017	Test Manufacturer A	Downloaded
201-201	Best Hearing	123456789-474146571	Aug 25 2017	Aug 25 2017	Test Manufacturer A	Submitted
201-201	Best Hearing	123456789-92849908	Aug 21 2017	Aug 18 2017	Test Manufacturer A	Downloaded
201-201	Best Hearing	123456789-349995793	Aug 21 2017	Aug 21 2017	Test Manufacturer A	Downloaded
201-201	Best Hearing	123456789-682108791	Jul 18 2017	Jun 28 2017	Test Manufacturer A	Downloaded
201-201	Best Hearing	123456789-951680317	Aug 14 2017	Jul 27 2017	Test Manufacturer A	Downloaded
201-201	Best Hearing	123456789-1027307350	Jul 24 2017	Jul 21 2017	Test Manufacturer A	Downloaded
201-201	Best Hearing	12987456-230794306	Jul 27 2017	Jul 27 2017	Sam's Ear Stuff	Submitted
201-201	Best Hearing	12987456-2004740699	Aug 21 2017	Aug 21 2017	Sam's Ear Stuff	Submitted
201-201	Best Hearing	12987456-275024431	Jul 27 2017	Jul 27 2017	Sam's Ear Stuff	Submitted
201-201	Best Hearing	007-2083756810	Aug 27 2017	Aug 25 2017	Locahan Earmeld Lab	Downloaded

**Fig. 10** The report has been created.

You can click one of the column headers to have the list sorted according to the selected column:

- The first click on a column header will sort the list in ascending order.
- A second click on the column header will reverse the sorting order.
- If the list is longer than one screen, use the **Arrow** keys at the bottom of the list to display the next or previous screen.

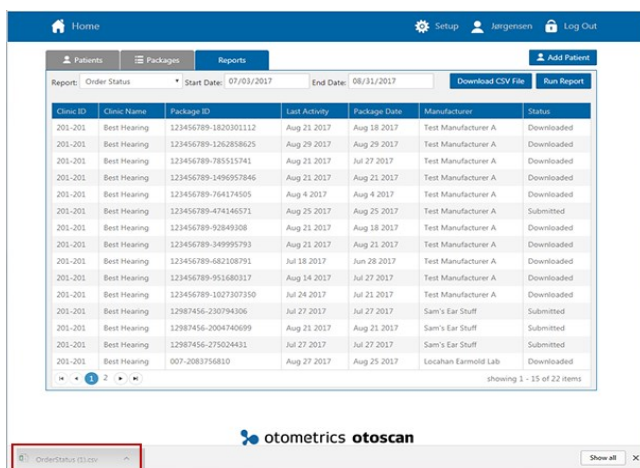
## 10.2 Exporting to Excel

You can download a .csv (Comma Separated Values) file and make additional analyses of the data in Excel.

To do so:

1. From the Otocloud **Home** page, click the **Reports** tab.
2. Select report and date interval as explained in [Creating a Report](#) ► 18.
3. Click **Download CSV File**.

If you are using Chrome, a link to the downloaded file will appear to the left on the bottom bar of Otocloud.



**Fig. 11** The link to the downloaded Excel file is seen to the left on the bottom bar.

4. Click the link to open the downloaded .csv file in Excel.
5. In Excel, select column **A**.
6. In the **DATA** menu, select **Text to Columns**.
7. Select the **Delimited** option and click **Next**.
8. Select the **Comma** option and click **Finish**.

Excel orders the data into columns, which enables you to use Excel for further analysis.

**Note** • This instruction refers to an external application, so details in the procedure may deviate from the above-mentioned steps. Follow current instructions from the manufacturer.

## 11 Profile management

All users can change their own name, password and user name.

1. To view and change your user settings, click your own name on the top bar of Otocloud. The **View User** dialog opens.
2. Click the button with the user detail that you want to change.
3. Make the required changes.
4. Click **Save** to save your changes or **Cancel** to close the dialog without making changes.

## 12 Administration

All the administrative settings, such as user management, manufacturer contact settings, and clinic details in Otocloud should be handled by a local Otoscan administrator.

To open **Setup**:

1. Click the **Setup** icon on the top bar.
2. Select the relevant tab: **Clinic Profile**, **HIM/EML**, or **Users**.



### 12.1 Clinic Profile Management

The administrator is responsible for managing the clinic profile.

- To access Clinic Profile Management, click **Setup** and select the **Clinic Profile** tab.

#### Copying the Clinic ID to the clipboard

Your clinic was assigned an ID number when you established your Otoscan account. This number is stated below your clinic name on the **Clinic Profile** page.

If you link your account in Otocloud (this account) to the eCommerce service of manufacturers, some of these may require you to state your Otoscan Clinic ID.

- To quote your ID number, use the **Copy** button next to the Clinic ID to copy it to the Windows clipboard.



#### Edit Clinic Profile details

1. Click the **Edit** button.

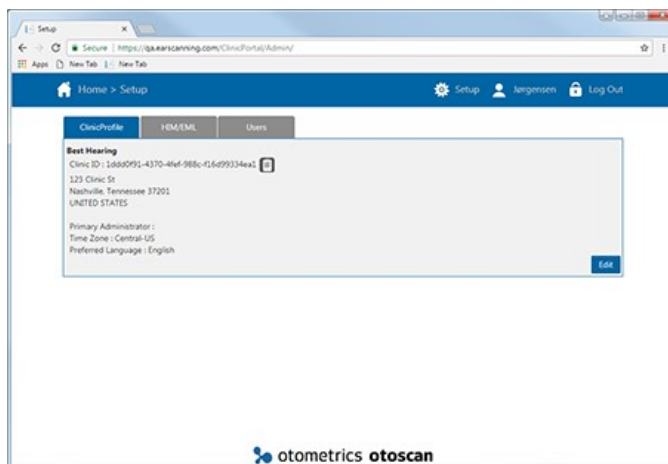


Fig. 12 The Clinic Profile page

The screenshot shows the 'Edit Clinic Details' dialog box. The 'Allow Probe Image Capture' checkbox is checked and highlighted with a red rectangle. Other fields include Name, Test Hearing, Phone, Fax, Primary Administrator, Street Address, City, State, Zip, Time Zone, and Preferred Language.

**Fig. 13** The **Edit Clinic Details** dialog.

Required fields are marked with an asterisk (\*).

The **Primary Administrator** selection can be changed by any user with the administrator role.

1. If the new administrator does not have an Otoscan user account, add them as a new user prior to completing this change. See [User management](#) ► 22.
2. Click the arrow and select the new primary administrator from the list of users.
3. Click **Save** to save your changes or **Cancel** to close the dialog without making changes.

The field **Allow Probe Image Capture**, marked with a red frame in [Fig. 13](#) ► 21, allows Otoscan to collect additional scanning information in order to improve Otocloud. Patient privacy is maintained, and no confidential patient information is captured. The field is checked by default.

- Clear the checkmark, if you do not want to provide this information.
2. Fill in or edit the relevant fields.
  3. Click **Save** to save your changes or **Cancel** to close the dialog without making changes.

## 12.2 Hearing Instrument Manufacturer and Earmold Lab connection

### Enabling Manufacturer and Earmold Lab connection

The administrator is responsible for enabling manufacturers for your company. Manufacturers where your clinic has an account can be added.

1. In **Setup**, select the **HIM/EML** tab.
2. Click the **Add** button.
3. In the **Add Manufacturer Relationship** window, enter the manufacturer information. You must have established an account with the manufacturer and obtained an account number in advance.

All information is required in order to save a manufacturer relationship.

4. Click **Save** to enable the relationship with the manufacturer, or **Cancel** to exit without making any changes.

As soon as you have saved the relationship it is possible to send scan packages to the manufacturer.

### Editing Manufacturer and Earmold Lab connection

1. In **Setup**, select the **HIM/EML** tab.

2. Click the name of the manufacturer whose data you want to change.
3. Edit the relevant information.
4. Click **Save** to save your changes or **Cancel** to close the dialog without making changes.

#### Removing a Manufacturer or Earmold Lab connection

1. In **Setup**, select the **HIM/EML** tab.
2. Select the check box to the left of the manufacturer you want to remove.
3. Click the **Remove** button. The connection to the manufacturer will be removed without further warning.

## 12.3 User management

The administrator is responsible for managing the users within your company.

### User roles

The administrator can assign different roles to different types of users:

- |                           |   |
|---------------------------|---|
| The <b>Admin</b> role     | This role allows you to access and edit clinic configuration settings such as manufacturer relationships and user management. It is recommended that only a few users have this role. The clinic's primary administrator automatically has this role. |
| The <b>Scanning</b> role  | This is the default role for new users.<br>This role allows you to scan a patient and send packages to the manufacturers.   |
| The <b>Reporting</b> role | This role allows you to create and export standard reports for the clinic. Standard reports include user and package reports.   |

### Adding a User

1. Click the **Setup** icon on the top bar.
2. In **Setup**, click the **Add User** button.
3. In the dialog that now opens, enter the required user details.

**Fig. 14** The **Add User** dialog.

4. Select the user roles that apply. A user may have more than one role.
5. Click **Save**. The system automatically sends an invitation to the specified email address and instructs the user to define a password.

### Editing a user

The administrator can edit any of the user's details.

1. Go to **Setup**, open the **Users** tab and select the user in question.
2. In the **View User** window, click the **Edit** link in the top right-hand corner.
3. Fill in or edit the relevant fields.
4. Click **Save** to save your changes or **Cancel** to close the dialog without making changes.

### Deactivating a user

- If a person is no longer authorized to use the Otoscan system, select the user and click the button **Deactivate User**. Deactivated users no longer have access to the system but will not be deleted.

## 13 Logging out

- To log out of Otocloud, click the **Log Out** icon to the far right in the top bar of the application.



If you leave Otocloud idle for 20 minutes, the system automatically logs you out. This is done to minimize the risk of unauthorized access to the data.

## 14 Manufacturer

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☎ +45 45 75 55 55  
📠 +45 45 75 55 59  
[www.otometrics.com](http://www.otometrics.com)

### Responsibility of the manufacturer

The manufacturer is to be considered responsible for effects on safety, reliability, and performance of the equipment only if:

- All assembly operations, extensions, re-adjustments, modifications or repairs are carried out by the equipment manufacturer or personnel authorized by the manufacturer.
- The electrical installation to which the equipment is connected complies with EN/IEC requirements.
- The equipment is used in accordance with the instructions for use.

The manufacturer reserves the right to disclaim all responsibility for the operating safety, reliability and performance of equipment serviced or repaired by other parties.

