

# BreezeSuite™ Cardiorespiratory Diagnostic Software

Version 8.6

Security Administrators Guide



Contact

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# INTRODUCTION

## Purpose of this Manual

This Manual provides step-by-step instructions on how to:

- Configure the admin account for management of software security
- Create and configure staff records
- Create and configure physician staff records
- Configure emergency logins
- Configure service account access

## Professional Installation Service

MGCD Diagnostics offers professional installation and upgrade service (service fees apply).

Professional service installation benefits include:

- Remote or onsite installation service
- Scheduled and reliable software installation for minimal downtime
- Software configuration assistance
- Report customization assistance
- Predicted set configuration assistance
- Diagnostics testing screen customization assistance
- Application security configuration guidance
- Data conversion assistance
- Device communication verification

Please contact MGC Diagnostics to discuss the installation service options available.

Phone: 800-333-4137


Email: [Support@MGCDiagnostics.com](mailto:Support@MGCDiagnostics.com)

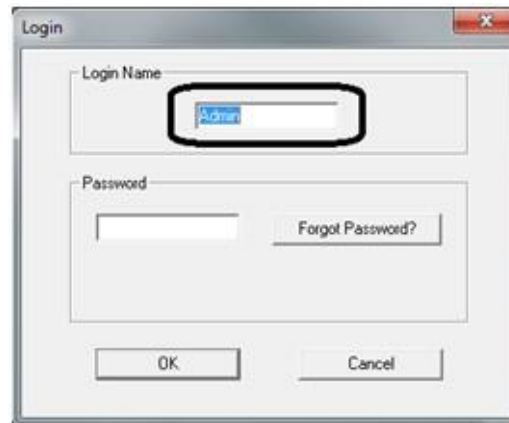
# ADMIN ACCOUNT SETUP

This section will take you through setup of the Admin account. Setup of the Admin account is required for all new installations of BreezeSuite and upgrades from BreezeSuite 6.x and 7.x software versions.

**Admin account setup is required for access to software.**

**Important:** MGC Diagnostics does not have a “back door” to the software application. Setup and management of the Admin user account must be reserved for the designated facility security administrator.

1. Open the software by selecting the  software icon from your computer desktop.
  - Enter “Admin” in the Login Name text box. No password is required during initial setup.
  - Select “OK” to proceed to setting the password for “Admin.”



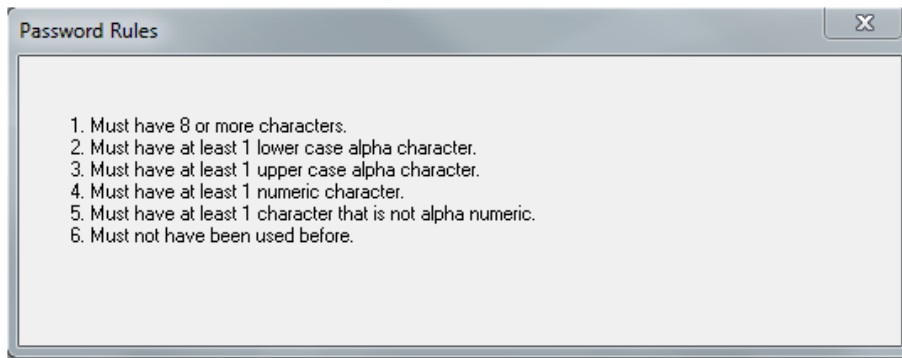
2. Select “OK” when prompted with, “You must supply a password” dialog.



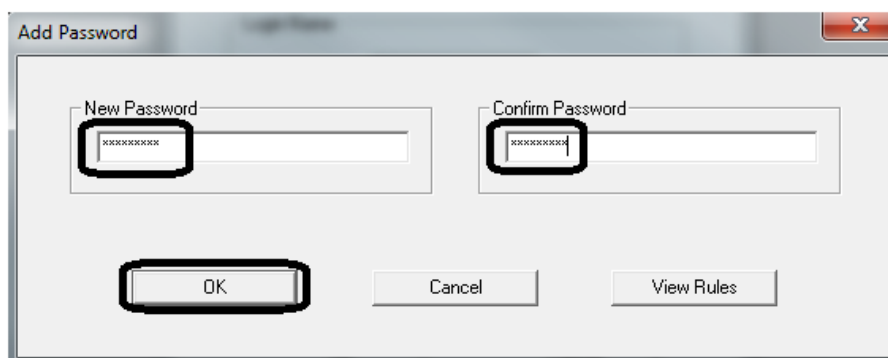
3. Select “View Rules” in the Add Password screen to view the password rules.



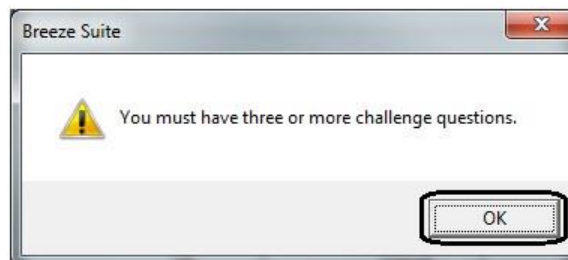
4. Verify your password for Admin will satisfy the Password Rule criteria and select the “X” to close the Password Rules window.




5. Enter “New Password” and “Confirm Password”, Select “OK”.



6. Select “OK” to “You must have three or more challenge questions” prompt.

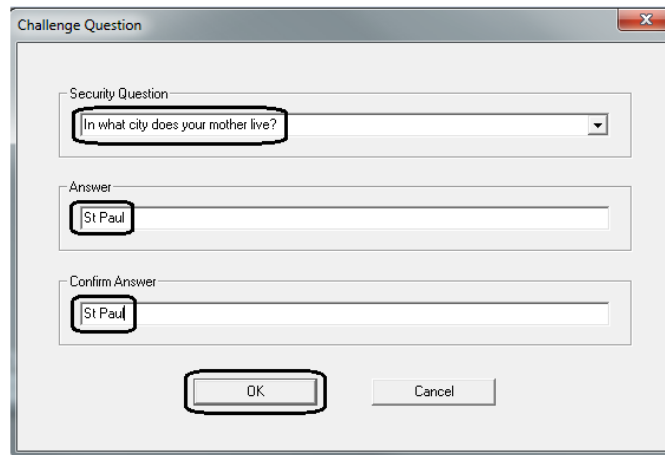


7. Select “ADD” to create first security question.

 **Note:** You must create three or more challenge questions

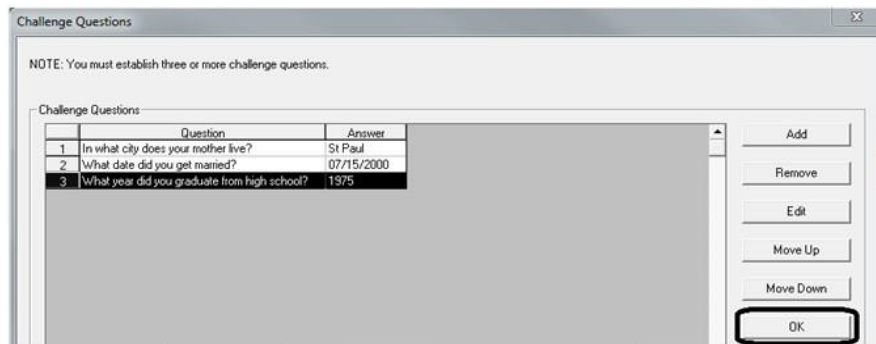


8. Select your 1st “Security Question”, enter the “Answer” and “Confirm Answer”. Select “OK.” Repeat steps 7 and 8 to complete adding security question #2 and #3.



A dialog box titled "Challenge Question" with a close button (X) in the top right corner. It contains three input fields: "Security Question" with a dropdown menu showing "In what city does your mother live?", "Answer" with a text box containing "St Paul", and "Confirm Answer" with a text box containing "St Paul". At the bottom are "OK" and "Cancel" buttons. The "OK" button is highlighted with a red rectangle.

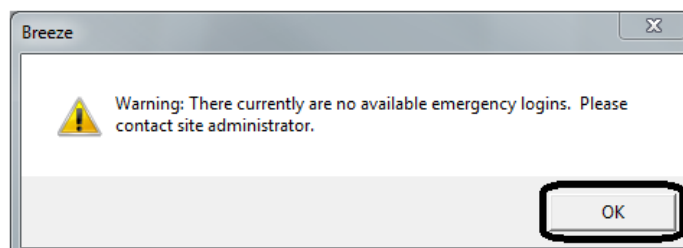
9. Select "OK" after adding three or more challenge questions.



A dialog box titled "Challenge Questions" with a close button (X) in the top right corner. It contains a note: "NOTE: You must establish three or more challenge questions." Below the note is a table with three columns: "Question", "Answer", and an empty column. The table has three rows of data. To the right of the table are buttons: "Add", "Remove", "Edit", "Move Up", "Move Down", and "OK". The "OK" button is highlighted with a red rectangle.

	Question	Answer	
1	In what city does your mother live?	St Paul	
2	What date did you get married?	07/15/2000	
3	What year did you graduate from high school?	1975	

10. Select "OK" to "Warning: There currently are not available emergency logins..." message.



A dialog box titled "Breeze" with a close button (X) in the top right corner. It contains a warning icon (yellow triangle with an exclamation mark) and the text: "Warning: There currently are no available emergency logins. Please contact site administrator." At the bottom right is an "OK" button, which is highlighted with a red rectangle.

**You have successfully completed the Admin Account Setup.**  
**Proceed through remaining sections of the Security Administrators Guide to complete the security setup.**

# STAFF TEMPORARY PASSWORD SETUP

(Upgrade Customers only)

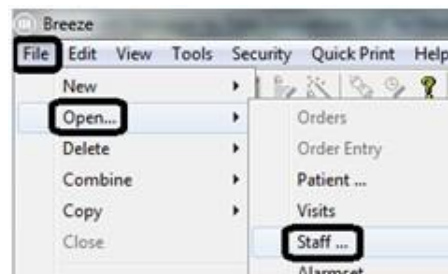
This section guides you through temporary password setup for staff records after an upgrade from BreezeSuite 6.x or 7.x versions. The temporary password will be used by staff when they access the software for the first time.

**Important:** Upgrading from software versions 6.x or 7.x will remove all staff passwords from the database.

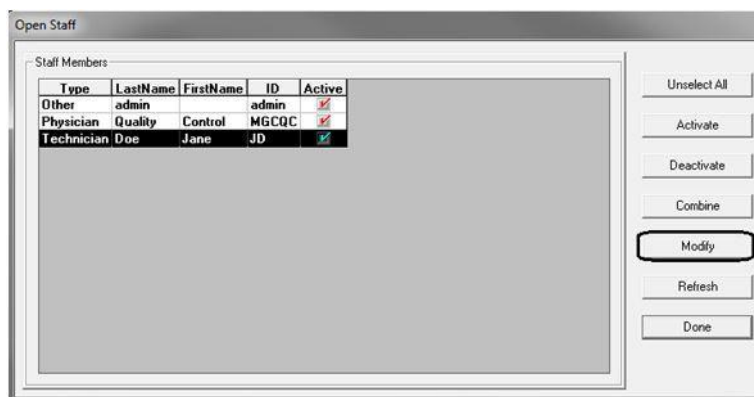
**Note:** Please use the “Staff Configuration Tracking Sheet” on the last page of this guide for assistance with tracking staff configurations.

User Permission Needed in Role	
Breeze Staff Rights:	“Edit” and “Edit Login Data” permission required

1. Open BreezeSuite software and Login.
2. If the Open Patient screen appears, select “Done” in the Open Patient screen.
3. Select the “File” menu in BreezeSuite and select the “Open > Staff” menu item.



4. In the Open Staff screen, highlight the staff you would like to set up the temporary password for and select “Modify.”



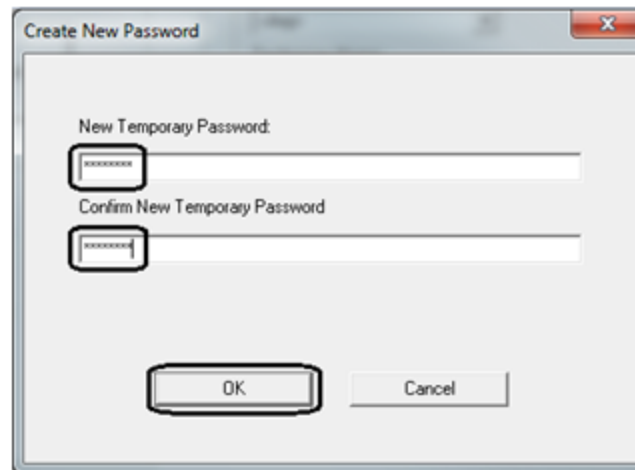
5. Select “Create New Password” to set the Temporary Password.

**Note:** The temporary password will allow the staff to create his/her own password and security questions upon their first login.

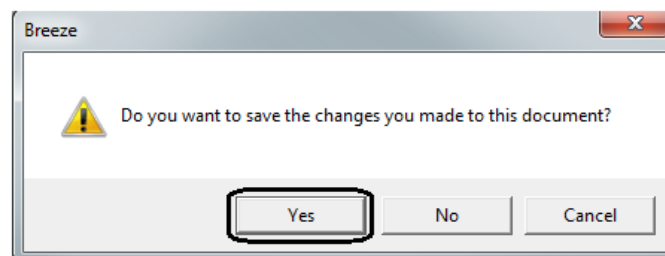


6. Enter the New Temporary Password and Confirm Temporary Password. Select OK.

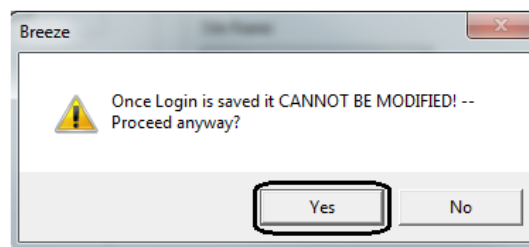
**Important:** You must securely retain the Login Name and Temporary Password for the staff and provide this information to him/her so they can configure their password and security questions upon first login.



7. Select "Yes" to save changes.



8. Select "OK" to confirm saving Login Name in the current format and acknowledging that the Login Name cannot be edited in the future for this staff.




9. Repeat steps 1-8 until all Staff temporary passwords have been created and click "Done" when complete.



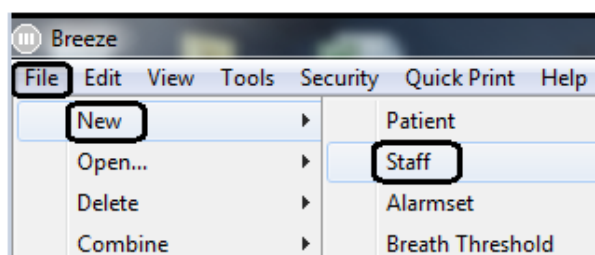
## NEW STAFF ENTRY

This section will take you through creating new staff and configuring software access for non-physician users


 **Note:** Please use the Staff Configuration Tracking Sheet or similar document on the last page of this guide for assistance with tracking staff configurations.

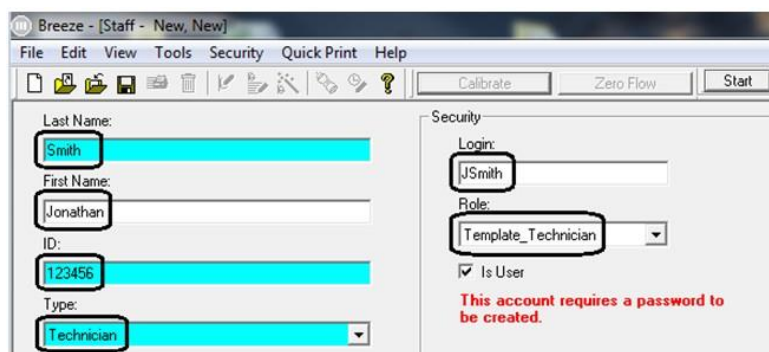
User Permission Needed in Role	
Breeze Staff Rights:	"Edit" and "Edit Login Data" permission required

1. Login to software using the "Admin" login name and password.
2. If the Open Patient screen appears, select "Done" in the Open Patient screen.
3. Select the "File" menu item. Select "New". Select "Staff."




4. Enter the required staff information.
  - Last Name = Last Name
  - First Name = First Name
  - ID = Unique Alpha, Numeric or Alpha Numeric identification number
  - Type = Technician or Other
  - Login = Unique Alpha, Numeric or Alpha Numeric login that staff will use to access BreezeSuite cardiorespiratory diagnostic software.
  - Role = Select the appropriate role for the staff.

 **Note:** We recommend using the provided Role Templates for staff. See Advanced Configuration Settings for additional information on Role configuration.

A screenshot of the 'Breeze - [Staff - New, New]' form. The form has two main sections: 'Staff Information' and 'Security'. In the 'Staff Information' section, 'Last Name' is 'Smith', 'First Name' is 'Jonathan', 'ID' is '123456', and 'Type' is 'Technician'. In the 'Security' section, 'Login' is 'JSmith', 'Role' is 'Template\_Technician', and 'Is User' is checked. A red message at the bottom states: 'This account requires a password to be created.'

5. Select "Create New Password" to set the Temporary Password.

 **Note:** The temporary password will allow the staff to create his/her own password and security questions upon their first login.



6. Enter the New Temporary Password and Confirm Temporary Password. Select OK.

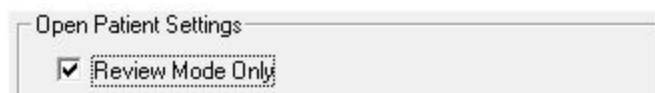
**Important:** You must securely retain the Login Name and Temporary Password for the staff and provide this information to him/her so they can configure their password and security questions upon first login.



7. **Optional Step:** Configure the desired “Open Patient Settings”

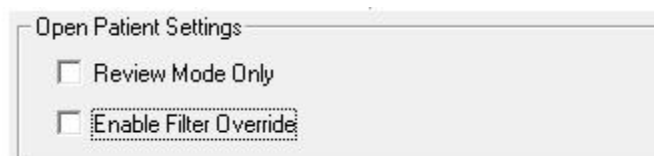
A. “Review Mode Only” setting

- This setting controls whether a user is restricted to reviewing completed tests only.
- MGC Diagnostics recommends enabling this setting for Physicians who will only review tests through BreezeReview.



B. “Enable Filter Override” setting

- This setting allows the user to change the “Patient/Visit Display Filters” and “Order Display Filters” defaults from within the Patient, Visit and Orders screens in BreezeSuite.



**Note:** Orders Display Filters configuration only applies to “BreezeConnect HL7 Orders” customers.


C. “Patient/Visit Display Filters” settings


- The Patient/Visit Display Filter settings control the default filters applied when the user opens the Patient List or Visit List screens.

1. Select the ☒ **Use Filters** checkbox to enable the ability to assign default Patient and Visit Display filters to the staff record. The filters listed in items 2-9 below apply when “Use Filters” is enabled.
2. Select the “Physician Type” drop list  and choose either <Any>, Referring, Reviewing or Pulmonary physician types assigned to the patient record.
  - For example, a technician will usually want to see all records in the database including records with no Physician Type assigned. In this case, select <Any>.
3. Select the “Physician Name” drop list  and choose <Any>, <Self> or a specific Physician Name.
  - For example, a technician will usually want to see all records in the database including records with no Physician Name assigned. In this case, select <Any>.
4. Select the “Technician Name” drop list  and choose <Any>, <Self> or a specific technician name.
  - For example, a technician will usually want to see all records in the database including records with no technician assigned. In this case, select <Any>.
5. Select the “Site Name” drop list  and choose <Any> or a specific site name.
  - For example, a technician will usually want to see all records in the database including records with no technician assigned. In this case, select <Any>.
6. Select the “Review Status” drop list  and choose <Any>, one of the available review status types
  - For example, a technician will usually want to see all records in the database including records with no technician assigned. In this case, select <Any>.
7. Select the ☒ **Include Patients With No Visits** checkbox to allow display of records with no testing performed.
  - For example, a technician may need to see new patients entered by the Electronic Medical Record system who have no tests performed yet. Therefore, this setting should be enabled.
8. Select the ☒ **Exclude Syringe Patients** checkbox to exclude display of syringe quality control records
  - For example, a technician may never perform syringe control testing. Therefore, this setting should be enabled so only patients are displayed.
9. Select the ☒ **Exclude Biologic Patients** checkbox to exclude display of biologic quality control records
  - For example, a technician may never perform biologic control testing. Therefore, this setting should be enabled so only patients are displayed.

#### D. Order Display Filters

- The Order Display Filter settings control the default filters applied when the user opens the Patient Order(s) List.

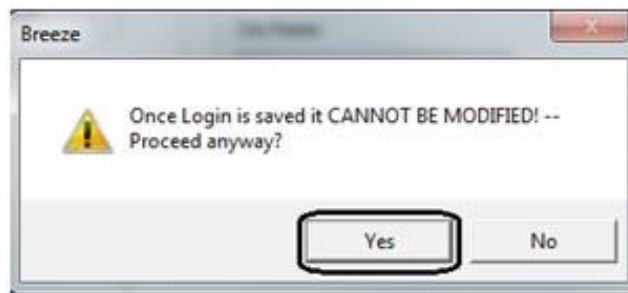
 **Important:** You must securely retain the Login Name and Temporary Password for the staff and provide this information to him/her so they can configure their password and security questions upon first login.

1. Select the ☒ **Use Filters** checkbox to enable the ability to assign default Patient and Visit Display filters to the staff record. The filters listed in items 2-9 below apply when “Use Filters” is enabled.
-  **Note:** Enabling this feature will make the Orders Display Filters the default filter in BreezeSuite when viewing the Open Patient list.
2. Select the ☒ **New Orders** checkbox to enable the user to view new orders for the patient.
    - This setting should be enabled for all staff performing diagnostic tests if Orders will be sent to BreezeSuite from the Electronic Medical Record system

3. Select the ☒ **Assigned Orders** checkbox to enable the user to view Assigned Orders for the patient.
  - This setting allows for view of Orders that have already been assigned to a patient record, however the diagnostics test/order has not been marked "complete"
4. Select the ☒ **Completed Orders** checkbox to enable the user of Patient/Visit filters.
  - This setting allows for view of Orders that have been marked "Complete"
5. Select the ☒ **Canceled Orders** checkbox to enable the user of Patient/Visit filters
  - This setting allows for view of Orders that have been marked "Cancelled"
6. Select the "File" menu in BreezeSuite and select the "Close" menu item.
7. When prompted, select "Yes" to save changes.



8. Select "OK" to confirm saving Login Name in the current format and acknowledging that the Login Name cannot be edited in the future for this staff.



9. Repeat steps 1-8 until all Staff entries have been completed.

## EMERGENCY LOGIN SETUP

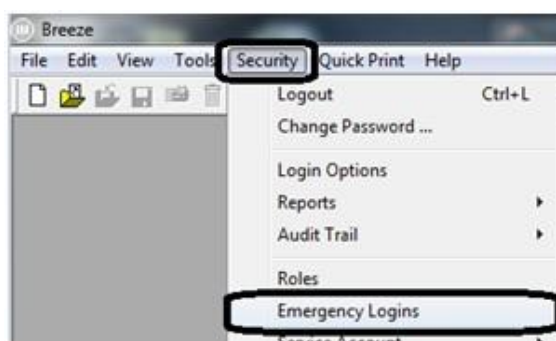
This section will take you creating and management of the Emergency Login account.

The Emergency Login allows “Break Glass” functionality for user without a user account to access the software.

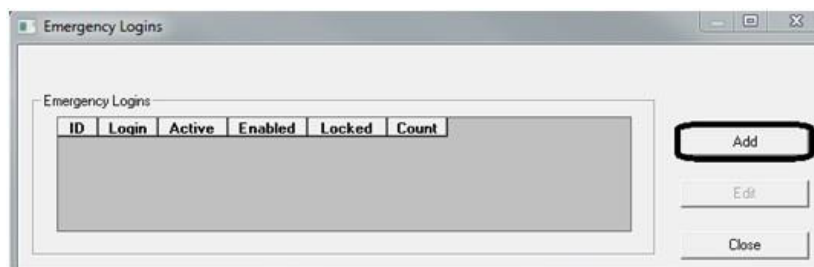
Emergency Login users can view patient information only.

User Permission Needed in Role	
Breeze Staff Rights:	“Edit Login Data” permission required

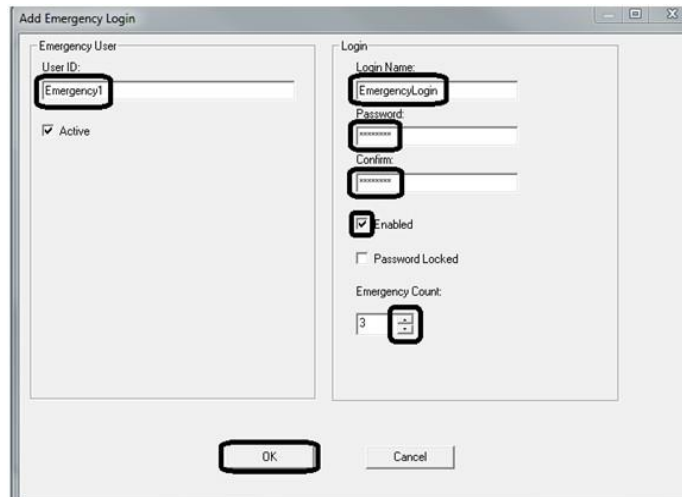
1. Login to software using the “Admin” login name and password.
2. If the Open Patient screen appears, select “Done” in the Open Patient screen.
3. Select the “Security” menu item. Select “Emergency Login.”



4. Select “Add” in the Emergency Logins screen.



5. Enter the following information in the Add Emergency Login screen and select “OK: when complete.
  - User ID = Unique Alpha, Numeric or Alpha Numeric identification number
  - Login Name = Unique Alpha, Numeric or Alpha Numeric login name
  - Password and Confirm
  - Enabled = Check Box to enable Emergency Login (recommended)
  - Emergency Count = Number of times the Emergency Login can access BreezeSuite cardiorespiratory diagnostic software. Default = 3. Can be set between 1 and 10.



The "Add Emergency Login" dialog box is shown. It has two main sections: "Emergency User" and "Login".

**Emergency User:**

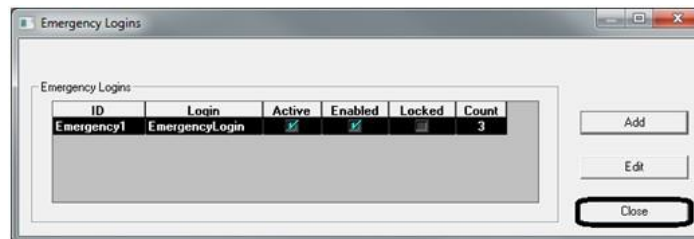
- User ID: Emergency1
- ☒ Active

**Login:**

- Login Name: EmergencyLogin
- Password: [masked]
- Confirm: [masked]
- ☒ Enabled
- ☐ Password Locked
- Emergency Count: 3

Buttons: OK, Cancel

6. Select "Close" in the Emergency Logins screen.



The "Emergency Logins" screen is shown. It contains a table with the following data:

ID	Login	Active	Enabled	Locked	Count
Emergency1	EmergencyLogin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3

Buttons: Add, Edit, Close

7. Repeat steps 1-6 to add additional Emergency Logins.


## SERVICE LOGIN ACTIVATION

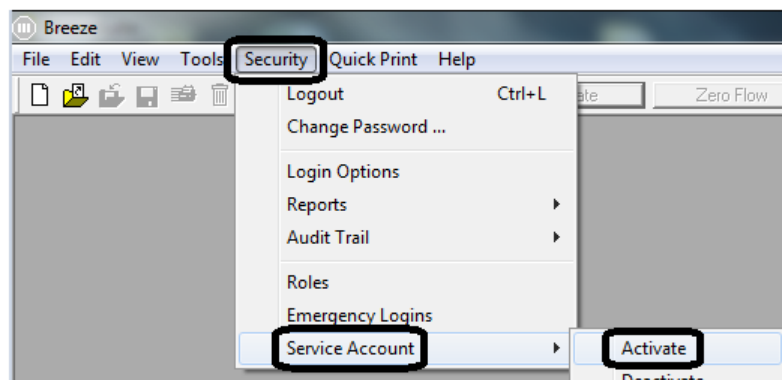
This section will take you through Service Login activation.

The Service Login allows audited access to the software when system service technicians requires access.\

User Permission Needed In Role	
Breeze Staff Rights:	"Edit" permission required

1. Login to software using the "Admin" login name and password..
2. If the Open Patient screen appears, select "Done" in the Open Patient screen.
3. Select the "Security" menu in BreezeSuite and select the "Service Account" menu item.

 **Note:** No confirmation of activation is displayed. No additional action is required. The Service account will remain active for 24 hours after first login.

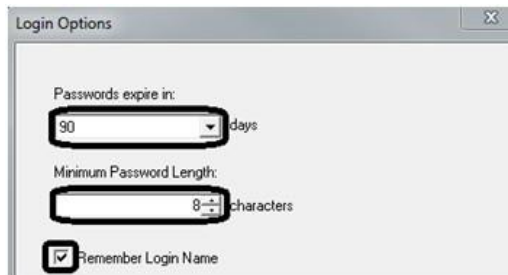


## ADVANCED CONFIGURATION OPTIONS

### Login Options

User Permission Needed in Role	
Breeze Staff Rights:	"Edit Login Data" permission required

1. Login to software using the "Admin" login name and password.
2. If the Open Patient screen appears, select "Done" in the Open Patient screen.
3. Select the "Security" menu in BreezeSuite and select the "Login Options" menu item
4. The Login Options screen allows for customization of the following:
  - Password Expiration (default 90 days) – Can be set between 30 and 90 days.
  - Minimum Password Length (default 8 characters) – Can be set between 8 – 30 characters.
  - Remember Login Name (default to enabled) – Disable to require entry of login name during login.



Login Options

Passwords expire in:  
 days

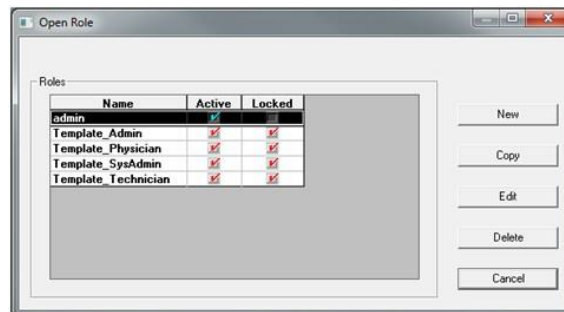
Minimum Password Length:  
 characters

☒ Remember Login Name

## Roles

User Permission Needed In Role	
Breeze Role Rights:	"Edit", "Delete" and "Lock/Unlock Roles" permission required

1. Login to software using the "Admin" login name and password
2. If the Open Patient screen appears, select "Done" in the Open Patient screen.
3. Select the "Security" menu item. Select "Role."
4. Select one of the following Role tasks:
  - New – Creates a new role to and opens "Rights" window.
  - Copy – Copies the highlighted role template and opens "Rights" window for editing.
  - Edit – Opens "Rights" window for editing and selecting role as active/inactive.
  - Delete – Deletes role Note: A role cannot be deleted if assigned to staff.



Open Role

Roles

Name	Active	Locked
admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Template_Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Template_Physician	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Template_SysAdmin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Template_Technician	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

New  
Copy  
Edit  
Delete  
Cancel



# STAFF CONFIGURATION TRACKING SHEET

Please use this sheet or a similar document for tracking of staff configuration information.

**⚠ Important:** To protect Login and Password data this type of document should always be stored in a protected, locked and audited location. This document should be destroyed after staff configuration is complete.

- Staff Types = Technician, Physician, Other
- Role (Templates) = Admin, Physician, SysAdmin, Technician
- Pulmonary Interpretation Type (standard) = ATS Complete (recommended), Complete, Alternative
- Exercise Interpretation Type (standard) = Complete Interpretation (recommended), Complete as Paragraph

STAFF ID	LAST NAME	FIRST NAME	TYPE	PULMONARY INTERPRETATION TYPE	EXERCISE INTERPRETATION TYPE	ROLE	LOGIN	TEMPORARY PASSWORD

MGC DIAGNOSTICS CORPORATION, through its subsidiary Medical Graphics Corporation  
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