

GenePix[®] Pro 6.0

**MICROARRAY ACQUISITION AND ANALYSIS SOFTWARE
FOR GENEPIX MICROARRAY SCANNERS**

User's Guide & Tutorial

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VERIFICATION

THIS PROGRAM IS EXTENSIVELY TESTED BEFORE DISTRIBUTION.
NEVERTHELESS, RESEARCHERS SHOULD INDEPENDENTLY VERIFY ITS
PERFORMANCE USING KNOWN DATA.

Table of Contents

Chapter 1 Installation	1
Computer Requirements	1
Computer—Minimum	2
Computer—Recommended	2
Installation of GenePix Pro 6.0	3
Connecting the Hardware Protection Key (Dongle).....	3
GenePix Pro Network Key	4
Starting GenePix Pro 6.0	4
Troubleshooting Installation.....	5
Chapter 2 Introduction	7
GenePix Pro 6.0 Features	7
Imaging	7
Analysis.....	8
Chapter 3 Software Principles	11
Spots, Features, Blocks and Arrays.....	11
Array Lists and the GenePix Pro Array List Generator	12
Barcode Reading	14
Image Display.....	14
How a Ratio Image is created	15
Biology of a Ratio Image	16
Analysis Algorithms.....	17
Computing Feature Intensities	17
Computing Background Intensities.....	17
Block Alignment and Background Thresholds	22

Computing Ratios.....	23
Quality Factors	26
Data Normalization	28
Origins of Variability	28
Normalization Methods.....	29
Normalizing.....	30
GenePix Pro File Formats.....	31
ATF—Axon Text File Format (*.atf).....	31
GAL—GenePix Array List File (*.gal).....	31
GPA—GenePix Settings File Settings (*.gpa).....	31
GPR—GenePix Results File (*.gpr).....	32
GPL—GenePix Lab Book File (*.gpl).....	32
GPS—GenePix Settings File (*.gps).....	32
JPEG—Joint Photographic Experts Group (*.jpg).....	32
TIFF—Tagged Image File Format (*.tif).....	33
Chapter 4 Tutorial.....	35
Image Acquisition	35
Image Analysis	35
Special Functions	35
Using the On-line Help.....	36
Image Acquisition	36
Starting GenePix Pro.....	36
GenePix Pro Analysis Only Mode	36
Performing a Preview Scan.....	37
Drawing a Scan Area.....	38
Performing a Data Scan.....	39
Performing a Single Wavelength Scan.....	39
Optimizing Scanner Settings.....	40
Saving Images	45
Image Analysis	47
Selecting a Color Mode.....	47
Opening an Image	48
Opening Images in Four-color Mode.....	48

Registering Images	49
Rotating Images.....	50
Customizing Ratio Formulation	50
Image Display and Color Control	51
Zooming the Display.....	52
Using the Navigation Window	52
Using the Feature Viewer.....	53
Creating and Using an Analysis Array.....	54
Spots, Features, Blocks and Arrays.....	54
Importing Clone Information	56
Aligning Blocks on an Image.....	58
Non-circular Feature-indicators	59
Zooming in on Blocks.....	60
Moving and Resizing Blocks	60
Rotating Blocks.....	60
Manually Moving, Resizing, and Fine-tuning Feature-indicators.....	61
Quick Zooms.....	62
Flagging Feature-indicators.....	62
Resetting Flags and Positions.....	63
Saving the Positions of Blocks and Feature-indicators	64
Locking Settings.....	64
Customizing Background Subtraction.....	65
Performing the Analysis and Viewing the Results.....	65
Using the Results Spreadsheet	66
Linkage.....	67
Web Interactivity.....	68
Normalization.....	69
Defining Your Own Flagging Criteria	70
Using Flag Features for Complex Quality Control Queries.....	72
Saving and Exporting the Data.....	74
Scatter Plot	75
Report Tab and Scripting	77
Special Functions	78

Measuring Tools.....	78
Pixel Plot	79
Histogram.....	80
Batch Analysis Tab	81
Workflow Automation Options.....	83
Find.....	84
Lab Book.....	85
Calibrate System.....	85
Using Two Scanners.....	86
Feedback.....	86
Summary.....	87
Appendix A Installing A Network Key	89
Technical Assistance	95
Customer License Agreement.....	97
Licensing Notice	99
Glossary	101
Index.....	103

Chapter 1

Installation

If you purchased a GenePix[®] 4000, 4100 or 4200 series scanner, you may have already installed GenePix Pro 6.0 following the scanner installation instructions. However, if you purchased the standalone GenePix Pro software, please use the following installation instructions.

Computer Requirements

GenePix Pro is fully functional with the Minimum computer requirements. However, satisfactory performance depends on the size of the files you will generate. The RAM and hard disk configuration is the most critical. If you plan to scan areas smaller than a full slide, or to scan regularly at 10- μ m resolution, the Minimum requirements will provide satisfactory performance of all GenePix Pro features. However, if you plan to scan full slides at 5 μ m, or if you plan to run other applications simultaneously, we strongly suggest the Recommended configuration.

Computer—Minimum

- IBM-compatible computer with a 1 GHz Pentium or faster
- Windows 2000 or XP operating system
- Memory requirements:
 - Full-size scan region at 5- μ m resolution:
1 GB RAM for two colors; 2 GB for three or more colors
 - 10- μ m scanning or partial-size scan regions at 5- μ m resolution:
512 MB RAM for two colors; 768 MB for three or more colors
- 40 GB hard drive (for image storage)
- Available full-size PCI slot for SCSI adapter (**Note:** the provided PCI SCSI adapter will not fit in a *low-profile* or *slimline* case)
- CD-ROM drive
- 1024 \times 768 display system with 65K colors
- Internet Explorer 6.0 or higher

Computer—Recommended

- IBM-compatible computer with a 2 GHz Pentium or faster
- Windows 2000 or XP operating system
- 2 GB RAM
- 80 GB hard drive (for image storage)
- Available full-size PCI slot for SCSI adapter (**Note:** the provided PCI SCSI adapter will not fit in a *low-profile* or *slimline* case)
- DVD-RW drive
- 1280 \times 1024 display system with 16M colors
- Internet Explorer 6.0 SP1

Installation of GenePix Pro 6.0

GenePix Pro 6.0 is on the included CD-ROM. Insert the CD-ROM into your computer and the installation program “Welcome To The GenePix Pro Installation CD” automatically starts. This gives you a number of options:

- Install GenePix Pro 6.0

Click this button to launch the GenePix Pro 6.0 installer.

- Install pdfFactory

pdfFactory is a third-party printer driver that enables you to print any document in any application as an Adobe Acrobat PDF file. Use it in GenePix Pro to archive quality control reports, for example.

- Install Examples Images

The CD contains some sample array images.

If the installation program does not start automatically, perhaps because you have the autorun feature of Windows disabled, you can manually start the installation by running the Setup.exe program file on the CD-ROM as follows:

From the *Start* menu select “Run”, and type `x:\GenePix\setup.exe` where “x” is the drive letter of your CD-ROM drive.

On Windows NT, 2000 and XP, you have to be an Administrator or Power User to install GenePix Pro.

Connecting the Hardware Protection Key (Dongle)

GenePix Pro requires a security key to operate. If the key is absent you can open images in GenePix Pro, but you cannot save your settings files or save your analysis results. In addition, you can analyze only 1000 features.

Installation of the single-user license key is straightforward. Simply connect it to the parallel port of your computer (or if it is a USB key, to a USB port). If you have a printer already connected to your parallel port, you can still use the key as it is a “pass-through” device: connect the key to the parallel port and then connect your printer to the key.

GenePix Pro Network Key

If you have purchased a multi-user license for GenePix Pro, you will be provided with a *network key*, which you need to install to access the full functionality of the software. The GenePix Pro network key is a single USB device that provides security authorization for multiple sites, avoiding the inconvenience of having to install individual security key devices for each computer on the network. The installation of a network key is quite straightforward, however it is a slightly more lengthy process than for the single-user license key, and the details are contained in Appendix A: Installing A Network Key.

Starting GenePix Pro 6.0

The GenePix Pro 6.0 installation creates an “Axon Laboratory / GenePix Pro” folder in your list of Programs in the Windows Start menu, containing a variety of GenePix Pro program icons. There are “GenePix Pro”, and “GenePix Pro (Analysis Only)” entries in your Axon Laboratory group, and a shortcut icon to GenePix Pro on your desktop. Both the “GenePix Pro” and “GenePix Pro (Analysis Only)” icons will start GenePix Pro. *The only difference between the two is that the ‘Analysis Only’ version does not interact with the scanner hardware in any way.* All the image and data analysis functionality is fully usable in both versions. If you are only analyzing data and are not doing any image acquisition, you would typically use the Analysis Only version, as the instrument is inactive in this mode and laser lifetime will be extended. For acquisition, select “GenePix Pro”. The “Axon Laboratory” folder also contains shortcuts to Uninstall, Help, Restore to Factory Defaults, Tutorial and GenePix Scanner Utilities.

Troubleshooting Installation

If you are having problems running the software, please consider the following:

- GenePix Pro 6.0 requires a minimum of 512 MB of RAM to acquire images. GenePix Pro is capable of analyzing data when less than 512 MB of RAM is present, but the maximum image size is reduced and performance will be non-optimal.
- GenePix Pro 6.0 requires a security key to save results or settings files, and to analyze images. If the key is not found, the software operates with limited analysis and file-saving functionality.

Chapter 2

Introduction

GenePix Pro 6.0 from Axon Instruments / Molecular Devices Corp., is a fully featured array acquisition and first-pass analysis software package. Its advanced imaging and data manipulation capabilities make GenePix Pro the software of choice for many of the leaders in array technology.

GenePix Pro 6.0 Features

Imaging

- Controls more than one GenePix scanner from the same computer;
- Calibrates and matches signal output from one or more scanners;
- Incorporates precise software control of the scan conditions and scan area, reducing scan time and image storage requirements;
- Acquires images from any GenePix scanner and displays a ratio image in real time;
- Automatically sets PMT gain;
- Displays and analyzes up to four wavelength images and three ratio images;
- Constructs user-configurable pseudocolor intensity and ratio images for the easy visualization of activity levels;

- Aligns and analyzes images from third-party scanners.

Analysis

- Automatically constructs resizable arrays of blocks and feature-indicators for identifying and analyzing individual features on a slide;
- Performs Batch Analysis of an unlimited number of microarray images;
- Automatically aligns circular, square or irregular feature-indicators with features;
- Automatically reads a variety of barcode types on array slides;
- Automatically associates individual array features with substance names and IDs;
- Allows multiple flagging of features as measures of individual feature quality, by fully general Boolean queries;
- Automatically calculates and subtracts background effects with a choice of algorithms, such as local, global, negative control and morphological methods;
- Includes two instant data viewers, one for instant zoom views and primary data previews (the Feature Viewer), and one that graphs pixel intensity distributions for individual features and includes more advanced data preview (the Pixel Plot);
- Includes measurement tools for detailed analysis of specific image regions;
- Includes advanced control of data and image normalization;
- Is fully integrated with web-based genomics databases;
- Presents the extracted data in a spreadsheet for rapid sorting;
- Draws Scatter Plots of any extracted data measurements for all the features on an array;
- Applies user-defined threshold boundary lines to Scatter Plot data;

- Exports intensity, ratio and quality measure data for analysis with advanced information systems;
- Is fully configurable on a per-user basis in multi-user environments;
- Automatically logs all experimental procedures and protocols in an electronic Lab Book;
- Includes full scripting support in VBScript and JavaScript for all acquisition and analysis functions;
- Is backed by unlimited technical support.

Chapter 3

Software Principles

GenePix Pro has been designed so that a user can acquire and analyze images of arrays without having to learn the finer details of image processing. While you can use a GenePix series scanner and GenePix Pro to acquire and analyze images without any training at all, understanding the concepts and algorithms used in GenePix Pro is invaluable for interpreting the acquired data. This chapter introduces the fundamental principles underlying the GenePix Pro software. In addition to this chapter, the Chapter 4 Tutorial provides information on some of the basic operations and terminology used in GenePix Pro.

Although GenePix Pro is used to control the GenePix scanner, you can use the software purely as an analysis platform. To do this, you need to be able to import array images in 16-bit TIFF format.

Spots, Features, Blocks and Arrays

Before we can discuss image analysis in GenePix Pro, we need to become familiar with some basic terminology. This information is discussed fully in Chapter 4, so only the key concepts are highlighted here.

Within GenePix Pro each individual spot on the array is called a *feature*, and is assigned a circular *feature-indicator*. Feature-indicators are the primary unit of

analysis in GenePix Pro. A collection of feature-indicators is called a *block*. There can be several *blocks* on a single *array*, depending upon the type and configuration of the arrayer that was used to place the features on the slide (see Figure 2 in Chapter 4).

Array Lists and the GenePix Pro Array List Generator

To employ the full power of automated array analysis possible in GenePix Pro 6.0, you can use the Array List Generator to construct a GenePix Array List (GAL) file. GenePix Pro uses GAL files to construct an array of blocks to match the size and positioning of printed features, and to apply substance names to the features. It is critical that the identity of the substance in each spot is maintained throughout the analysis, so use a GAL file when you have files containing substance IDs and names for each spot on the array. Substance IDs must be unique identifiers, such as Swiss-Prot and FlyBase identifiers, or GI (GenInfo Identifier) numbers. For more information on the format and content of GAL files, see our webpage:

http://www.axon.com/GN_GenePix_File_Formats.html

The Array List Generator is designed to work with arrayers and arrays that have the following characteristics:

- The slides and source plate(s) are perpendicular to one another.
- The robotic motions follow a raster pattern (left to right, then down, left to right again), both in loading samples from the source plate, and when depositing subsequent spots onto slides (movement between slides does not have to follow a raster pattern).
- There are no replicate spots (although there can be replicate samples in the microplate wells).
- There is one block of spots per pin being used (*e.g.*, 4 pins = 4 blocks of *m* rows and *n* columns).

Therefore, you cannot use the Array List Generator to automatically create a GAL file in the following cases (although you may always create one manually):

- Arrays where the printhead is in the opposite orientation to the slide (*e.g.*, pin 1,1 dips into well A,12).
- Replicate spots of any nature (either in adjacent spots, or in separate blocks). However, the user can manually edit the GAL file to insert replicates.
- Non-standard robotic movements, such as printing out of sequence (*e.g.*, returning to previously used wells in the source plate).
- Robotics movements that are non-raster (such as top to bottom, then over), either in loading sample from the source plate, or in the slide spotting pattern.
- More than one block per pin.
- Slides printed on arrayers from Affymetrix/GMS, Amersham Pharmacia Biotech/Molecular Dynamics, or Intelligent Automation Systems (IAS).
- Slides printed on other commercial arrayers that do not conform to the aforementioned specification.

Many commercial arrayers automatically generate GAL files. If your arrayer does not have GAL output functionality, please contact your arrayer manufacturer directly and request GAL file support.

A standard GAL file contains at least four, and at most five, data columns containing position and identity information for each feature: ‘Block’, ‘Column’, ‘Row’, ‘ID’ and optionally, ‘Name’. A new feature in GenePix Pro 6.0 is the ability to read GAL files containing user-defined columns beyond these five, should you wish to include extra annotation information about your features—for example, their status as normalization spots. Of course GenePix Pro 6.0 will still read standard GAL files, and any extra columns in a new-format GAL file are simply ignored by previous versions of GenePix Pro.

To load a GAL file into GenePix Pro, use the *Load Array List* command (available under the *File...* button on the right-hand side of the GenePix Pro window).

Barcode Reading

If a slide has a barcode on it, GenePix Pro automatically reads the barcode symbols from Preview Scans, Data Scans and saved images. The extracted barcode symbols are reported in the “B:” field in the Status Bar at the bottom of the GenePix Pro window, and are exported in the header of the Results file. In addition, you can use the barcode symbols as the file name of the image. To do this, check the *Barcode* option in the *Save Images* dialog box.

GenePix Pro reads four of the most common barcode formats—code 39, code 128, code 12of5 and codabar—which have the following properties:

Barcode Type	Numerical Characters	Alpha Characters	Special Characters	String Length
Code 39	0–9	A–Z, space	– \$ % + /	no limit
Code 128	All ASCII characters			no limit
Code 12of5	0–9	N/A	N/A	no limit (even)
Codabar	0–9	N/A	- : . \$ / +	no limit

If you know the type of barcode that your slides use, you can set the barcode detection so that it searches only for that type. This speeds up the detection process. Open *Options / Workflow* and click the *Barcode Types* button.

Image Display

The GenePix 4100 and 4200 scanners operate using sequential scanning: that is, the slide is scanned twice, first using one color laser, and then the second. The images at the two wavelengths are displayed as they are acquired in real time; a ratio image appears as the second wavelength image is superposed on the first. The GenePix 4000 scanner uses a simultaneous dual-laser scanning system to acquire and display both wavelength channels as a ratio image in real time.

How a Ratio Image is created

In GenePix Pro, each raw wavelength image, such as the green 532 nm image or the red 635 nm image, is collected at 16-bit resolution. GenePix Pro ratio images are standard 24-bit composite RGB (Red-Green-Blue) images. When GenePix Pro is set to the default red–green display scheme in two-color mode, with the default ratio formulation, the image from the 532 nm laser is placed in the green channel, and the image from the 635 nm laser is placed in the red channel. The blue channel is set to 0. So each color channel of the RGB images is composed only of an 8-bit image.

This means that the ratio image is not, strictly, an image of the ratio data.

For display purposes only, each of the individual wavelength images must be reduced to 8 bits in order to be displayed as a 24-bit composite RGB overlay image. There are two options to reduce each raw wavelength image to 8 bits:

- compress 16 bits into 8 bits, or
- selectively use only 8 of the 16 bits.

GenePix Pro provides the ability to do either using commands in the *Color* menu.

To compress the 16 bits into 8 bits, the software uses a square root transform, whereby the square root of the image intensity is computed and displayed, which effectively reduces 16 bits to 8 bits ($\sqrt{\{2^{16}\}} = 2^8$).

Alternatively, to strip out 8 of the 16 bits, GenePix Pro can be configured to keep only the bottom, middle or top 8 bits. The effect of each of these options on the range of the intensities that is used to display the ratio image is summarized in the table below:

<i>Method of Ratio Processing</i>	<i>Range of image intensity that is used</i>
Square Root Transform	0–65535
Preserve High Intensities	256–65535
Preserve Middle Intensities	16–4095
Preserve Low Intensities	0–255

What happens if you have selected a ratio processing method and you have pixels that are outside the range of acceptable intensities?

First, it is important to remember that the ratio processing method affects only the display of the ratio; it does not have any effect on the display of the raw wavelength images, nor does it affect the computation of the ratio data displayed in the Results tab.

Ratio processing is best illustrated with an example. Suppose you have a pixel that has a green value of 15000 and a red value of 30000. If the ratio that you are computing is based on red divided by green, the ratio value would be 2 ($30000 / 15000$). If you are using the “Square Root Transform” method, you can display all pixels from 0 to 65535. In this scenario, the pixel in question is red, as the red channel is contributing twice the intensity to the RGB image as the green channel.

However, when you select “Preserve Low Intensities” the maximum pixel value is now 255. In this case, both the green and red pixels are contributing the same intensity to the RGB image since each image is effectively treated as 255. This is because both images exceed an intensity of 255, and are thus clipped at a value of 255. The result is a ratio displayed that is yellow, corresponding to a ratio of 1 ($255 / 255$).

Although GenePix Pro can analyze four individual wavelength channels, a ratio image can only be created from two at a time. The user can specify up to three independent pairs of channels to display as ratio images.

Biology of a Ratio Image

The ratio image typically represents the comparison of *test* to *reference* substance that is bound to the *spotted* (or arrayed) substance.

Suppose the *reference* substance is labeled with Cy3 (which is excited by green laser light such as 532 nm), and suppose the *test* substance is prepared in the presence of Cy5 (which is excited by red laser light such as 635 nm). Both of these substances are mixed with and bind to the *spotted* substance on a slide. In the derived ratio image, a red spot indicates that the test substance for this feature is more abundant than the reference substance, which means that it has a higher

activity than the reference; a green spot indicates that the test substance has a lower activity than the reference substance; a yellow spot means that there is no change in the activity level between the two populations of test and reference substance.

Analysis Algorithms

To quantify changes in activity accurately, you must extract the intensity of a given feature from an image, and refine this data before a final ratio value is computed. In addition, several other parameters are measured to evaluate the quality of the data for a given feature. The following section describes how each computation in GenePix Pro is performed.

Computing Feature Intensities

For each raw image, the mean, median, and standard deviation of the pixel intensities in each feature-indicator is computed. The pixels that are used to compute the standard deviation include all of the pixels that are completely inside the feature-indicator. Any pixel that contacts the boundary that defines the feature-indicator is excluded.

Computing Background Intensities

The fluorescent intensity that is measured inside a feature usually includes a certain amount of stray fluorescence from various sources:

- auto-fluorescence of the slide
- non-specific binding of test and reference substance.

This stray fluorescence, known as background, needs to be subtracted from the measured feature intensity in order to come to a true measure of the fluorescence of a feature. To this end, GenePix Pro 6.0 offers four different classes of background subtraction methods:

- local methods

- global methods
- negative controls
- morphological methods.

Each background subtraction method has advantaged and disadvantages.

The **local median intensity** is the default GenePix Pro background subtraction method. Local methods, where the background value for a feature is calculated from a region near the feature, have the advantage that they track background variation across a slide. However, they can be unrealistically high or low if there are local defects near a feature, and thus they may not be representative of the background contribution inside a feature.

In particular, if background fluorescence is due to non-specific binding, and if non-specific binding is more likely to occur on features than between features, then background estimated from regions between features may underestimate the background fluorescence within features.

Global background methods, where a single background value is calculated for each wavelength, have the advantage of providing a uniform background estimation for a whole slide, particularly when features are so close together that local methods cannot be applied. However, where the background varies significantly across a slide, one single estimate may not accurately represent the background contribution to all features.

Negative control methods, where the background for a feature is estimated from the intensity of a nearby feature, have a number of advantages over local and global methods.

Negative controls are features that are known not to be reactive, so that they can relied upon always to give the same intensity values independent of the experiment.

First, if background is due to non-specific binding, then it is plausible that non-specific binding is higher where features have been printed on a slide, compared to the space between features. Thus it makes sense to estimate non-specific

fluorescent background from negative control features, rather than from local regions between features.

Second, if implemented correctly, background intensities can be calculated from negative controls close to a feature, and thus will vary as the background varies across a slide. Thus negative control methods have the advantages of local methods, with none of the disadvantages.

However, unlike all the other background subtraction methods, which are purely computational and can be applied to any slide, negative controls must be part of microarray slide design from the beginning.

Morphological methods address a problem that all of the other three methods can exhibit, namely that the background estimated for a feature can be higher than the feature's intensity. This situation is rather catastrophic, as a negative background-subtracted intensity leads to a negative ratio, and hence an undefined log ratio, meaning that the feature is lost from all further data analysis.

In morphological methods, a copy of each single-wavelength image is created, and then each image is filtered to construct a background image for each wavelength. GenePix Pro employs two different morphological background methods:

- **Closing followed by opening.** Small dark regions are filled in on the background image, then a local minimum filter is applied to the whole image.
- **Opening.** A local minimum filter is applied to the whole image.

The Opening method produces a significantly lower estimate of background than any other background subtraction method. It guarantees that the background estimate is always lower than the feature intensity. However, it may underestimate the true background level.

Compared to the default local background subtraction method, Closing followed by Opening produces background estimates that are slightly lower for regions of low background, but significantly lower for regions where there are bright patches in the

background. However, background-subtracted intensities can still be negative using this method.

Regardless of the method chosen, the calculated background intensity is subtracted from the feature intensity before any ratios are calculated.

Local Methods

In local background subtraction methods, a different background is computed for each individual feature-indicator, and the mean, median and standard deviation of the background pixel intensities are reported. For all ratio calculations that require background subtraction, the median background value is used.

The background is calculated using a circular region that is centered on the feature-indicator. This region has a diameter that is three times the diameter of the corresponding feature-indicator. All of the pixels within this area are used to compute the background unless one of the following is true:

- the pixel resides in a neighboring feature-indicator;
- the pixel is not wholly outside a two pixel wide region around a feature-indicator;
- the pixel is within the feature-indicator of interest.

In Figure 1, the black region represents the pixels used for computing the background, the dark gray region represents the pixels used for the feature intensities, and the light gray region represents excluded pixels.

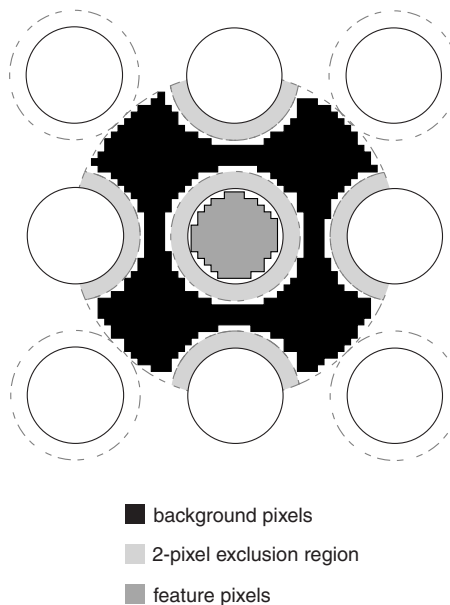


Figure 1. Defining background pixels.

The diameter of the background region and the width of the exclusion region around a feature are user-configurable. Typically, you would make the exclusion region smaller and the diameter of the region larger as the density of features on your arrays increases.

To change these settings:

- Click the *Options* button on the right-hand side of the GenePix Pro main window.
- Switch to the Analysis tab.
- Under Background Subtraction, edit the values for the exclusion region and the background region.

In addition to computing the local background, GenePix Pro reports the percentage of pixels that exceed several local background-related thresholds: the percentage of pixels that are greater than the background+1 standard deviation, and background+2 standard deviations. These threshold-related values are often useful in evaluating the quality of the data.

Global Methods

GenePix Pro 6.0 offers several global background subtraction methods. In a global method, a single value for the background is used for a whole array at each wavelength.

The global background values are either calculated from a mean or median of all local values, or specified by the user as individual values for each channel.

Negative Controls

To use negative control background subtraction, you must identify features as negative controls by giving them a characteristic substring in their ID. By default, GenePix Pro looks for the substring "_NCTRL". For each feature, the Name of the nearest negative control in the same block appears in the Negative Control column in the Results tab.

The identifying substring is not case-sensitive, so you can use "_nctrl" or "_Nctrl", for example.

Morphological Methods

Morphological background subtraction starts with a copy of the image and filters it to construct a background image. The background value for a feature is then the intensity at the feature's center on the background image.

Closing removes small dark regions from the image. Any dark region that fits into a square with sides given by the closing value is removed from the image. Closing prevents the measured background from being too low.

Opening removes bright regions. It is the inverse operation of closing. Any bright region that fits into a square with sides given by the opening value is removed. Opening prevents the measured background from being too high.

If the opening value is too small then features may not be removed from the background image. This typically happens on high-density arrays where the features are very close together.

Block Alignment and Background Thresholds

To align a feature-indicator with a feature, the GenePix Pro's proprietary spot-finding algorithm makes several assumptions about feature intensity relative to the intensity of the background, feature size, and feature position.

A feature is marked 'Not Found' if:

- the feature has fewer than 6 pixels; or
- the feature diameter found is greater than the lesser of: (a) three nominal diameters (as set in Block Properties) or, (b) the diameter that would cause it to overlap an adjacent feature of nominal diameter; or
- the feature diameter goes outside the bounds set in *Options / Alignment*; or

- the feature has been found in a position that would overlap an adjacent feature.

If the spot-finding results in feature indicators that are larger than your features, it can be due to extreme background variation: bright background pixels may be included as feature pixels. To avoid this, try increasing the *Composite Pixel Intensity* threshold value in the *Alignment* tab of the *Options* dialog box to a value slightly higher than the brightest background pixel near your features.

Computing Ratios

GenePix Pro 6.0 computes a large number of different ratio quantities, each of which provides a different insight into the raw data. The main ratio quantities are described on the following pages and their significance is briefly discussed. They are divided into three different subgroups: those that are ratios of quantities derived from whole features (such as median and mean pixel intensities), those that are derived from pixel-by-pixel ratios of intensities, and quality factors.

All ratios and derived quantities are corrected for background effects. Pixel intensities at a wavelength have the median intensity of background pixels at that wavelength subtracted from them to produce a corrected intensity.

To get a better understanding of ratio computations it is useful to examine the Pixel Plot (press <P> when the cursor is over a selected feature-indicator). This plot shows you the pixel values for a selected feature, so you can see the contribution of each pixel to a ratio value.

Note: The form of all ratio calculations in GenePix Pro 6.0 is user-selectable from the *Options / Analysis / Ratio Formulation* dialog box. In this Guide, we assume that wavelength 2 is always in the numerator and wavelength 1 is in the denominator.

Ratios of Overall Derived Feature Properties

In ratiometric fluorescence studies we are typically most interested in the difference in activity levels between the test and the reference substance. This eventually translates to differences in intensity on the two images analyzed by

GenePix Pro, which can be quantified by taking a ratio of image intensities for each feature. Because each feature on the image is made up of many pixels, we need a method of finding a representative intensity for each feature.

Ratio of Medians

Median intensities are often preferred to arithmetic mean intensities because they are not as seriously affected by extreme values at either end of a distribution. The *ratio of medians* is the ratio of the background subtracted median pixel intensity at the second wavelength, to the background subtracted median pixel intensity at the first wavelength.

Ratio of Means

Mean intensities are familiar quantities, but they can be significantly skewed by extreme values at either end of a distribution. However, calculating the mean allows you to evaluate the variability of the data. This variability is reported as the standard deviation. The *ratio of means* is the ratio of the arithmetic mean of the background-subtracted raw pixel intensities at the second wavelength, to the arithmetic mean of the background subtracted raw pixel intensities at the first wavelength.

On grounds of consistency you might expect to use the mean background instead of the median background when using the mean intensity. However, it is more important to use the most reliable value for the background than to be consistent simply for the sake of it. The fact that means can be skewed by extremely low and high values suggests that you should use the median background.

Quantities Derived from Pixel-by-Pixel Ratios

An alternative to computing the ratio from calculated means and medians of each whole feature is to compute the ratio on a pixel-by-pixel basis, and then to calculate the arithmetic mean and median of these many ratio values. An advantage of this approach is that non-specific signal, which appears in both

wavelength images, has less of an effect than when the feature is treated as a whole.

Median of Ratios

As is the case with the overall derived feature properties, median intensities are often preferred to mean intensities because they are not as seriously affected by extreme values at either end of a distribution as compared to the arithmetic mean. The *median of ratios* is the median of the pixel-by-pixel ratios of pixel intensities that have had the median background intensity subtracted.

Mean of Ratios

The *mean of ratios* is the geometric mean (*i.e.*, the mean in log space) of the pixel-by-pixel ratios of the raw pixel intensities.

Regression Ratio

The regression ratio is a method of computing the ratio that does not require rigidly defining background and foreground pixels, so it is the most objective of the three methods. Every pixel within a circle of twice the diameter of the feature of interest is used. The relationship between wavelength 1 and wavelength 2 is determined by computing a linear regression between these two populations of pixels. The slope of the line of best fit (least-squares method) is the regression ratio. The coefficient of determination provides a measure of the level of accuracy of the fit.

Because the regression ratio does not make any assumptions about which pixels are feature pixels, and which pixels are background pixels, saturating pixels can distort the regression ratio as they heavily weight the slope of the best-fit line. On a good array, all of the ratio values tend to converge. If the regression ratio is significantly different from the other ratio quantities for some of your features, look at each of these features in more detail to determine what is causing the deviation. The Pixel Plot (Hot Key <P> with the mouse cursor over a feature-indicator) is a useful tool for this.

Quality Factors

Sum of Medians and Sum of Means

The sum of medians and the sum of means are useful measures to interrogate the quality of an individual feature. If either sum is unreasonably low, this indicates that there is very little signal in both channels, suggesting that any ratio derived from this feature should be interpreted with caution.

The sum of medians is the sum of the median of the pixel intensities at each wavelength, with the median background pixel intensity at each wavelength subtracted.

The sum of means is the sum of the arithmetic mean of the pixel intensities at each wavelength, with the median background pixel intensity at each wavelength subtracted.

As of GenePix Pro 6.0, these quantities are calculated on a per ratio channel basis; that is, for each pair of wavelengths in a ratio, a separate sum of medians and sum of means column is calculated.

Log Ratio

The log ratio is a base two logarithm of the ratio of medians. This type of log transformation is often used in ratiometric studies as it helps to compare levels of over-activity and under-activity. For example, if you have a four-fold increase in activity (*i.e.*, a ratio value of 4), the log base 2 ratio is +2; if you have a four-fold decrease in the ratio (*i.e.*, a ratio value of 0.25), the value is -2. The log base two transform is simply a quicker way of observing the similarity of these two conditions.

Signal to Noise Ratio

Signal-to-noise is important for determining the confidence with which one can quantify a signal peak of a given value, especially a signal near background. The confidence in quantifying the peak increases as the *variation* in

background signal (the ‘noise’) decreases, regardless of the absolute value of the average background.

One can easily compute the signal-to-noise ratio (SNR) by measuring the mean signal intensity for a feature, subtracting the mean background signal, and dividing by the variation in the background, so the signal-to-noise ratio is defined as:

$$(F635\text{Mean} - B635\text{Mean}) / B635\text{SD}$$

where F635Mean is the mean of all the feature pixel intensities at 635nm, B635Mean is the mean of all the background pixel intensities at 635nm, and B635SD is the standard deviation of the background pixel intensities at 635nm.

Because medians are more robust to outliers than means, we typically recommend the median instead of the mean as a measure of feature or background intensity. However, because the signal-to-noise ratio is well understood theoretically when calculated using means, and a threshold of 3 is well established as a measure of detectability, we calculate the signal-to-noise ratio using the mean intensity and mean background.

Flags

GenePix Pro 6.0 provides the ability to flag individual features manually with quality flags, such as ‘Good’, ‘Bad’, ‘Absent’ or ‘Not Found’. Flags are also used to indicate which features to use in the normalization of the image.

The ‘Bad’ flag is useful when doing a cursory analysis of your images. If you observe a region where the features are sub-standard, you can flag them ‘Bad’ and a flag value of –100 is noted in the analysis results.

Alternatively if you see a feature that shows some especially promising properties, you may want to flag it ‘Good’. If so, a flag value of +100 is noted in the Results. Select flagging commands from the right mouse menu in the Image tab, the Results tab or the Scatter Plot tab, or from the Feature menu on the right-hand side of the GenePix Pro main window.

‘Absent’ (numerical value -75) is applied to a feature when a GAL file is missing an entry for a feature, or when the ID is ‘Empty’.

A feature is flagged ‘Not Found’ (numerical value -50) when *Align Blocks* fails to align a feature-indicator. See above Section “Block Alignment and Background Thresholds”, for conditions under which alignment can fail.

In GenePix Pro 6.0, the Good and Bad flag values are different when they are applied from the *Flag Features* dialog, so that you can separate manual from automatic flagging procedures in your downstream analyses. A Good flag applied from *Flag Features* is given the value 99, while a Bad flag is given the value -99 .

A second type of flag is the Normalize flag. It has its own column in the Results tab, and is used to mark features for use in Normalization. For each feature you can choose to *Include in Normalization* or *Remove from Normalization*. When exported, these flags have the values 1 and 0 respectively.

Features can be flagged according to general Boolean conditions using the *Flag Features* dialog box. In this dialog box you can construct queries by selecting commands with buttons, or you can type in any arbitrary expression in VBScript. The expression is evaluated for each row in the Results tab, and features are flagged according to whether or not the expression is true or false for them. See “Defining Your Own Flagging Criteria”.

Data Normalization

Origins of Variability

Comparing the data from different array experiments is a non-trivial task. Small variations in the many steps that produce an array image can make comparisons across arrays problematic. Variations can be due to differences in labeling efficiencies (dye and batch variations), chemical properties of different dyes, pin tips, slide batches, and scanner settings (*e.g.*, red/green channel settings, multiple

scanners). Any of these variations can be corrected by normalization. No one normalization method will correct all types of variation. Choose a normalization method based on the known or expected sources of error, and the characteristics of the experiment. Validate the method empirically, for example by reversing the dye labeling to test a normalization method for channel balancing.

In the acquisition step of an experiment, one of the main contributors to variability between arrays is setting PMT values incorrectly, so that the total signal acquired in one channel is significantly different to the total signal acquired in the other. (We are assuming that when scanning a particular sample, the total signal in each channel is in fact the same.) In such a case ratio values may be biased towards one channel. To minimize this form of variability, you should perform preliminary scans to adjust the PMTs so that they are producing roughly the same response in both channels. See “Optimizing Hardware Settings” in Chapter 4.

Normalization Methods

In the analysis step, you can improve comparisons across many arrays by normalizing the data from each array. One method of normalization is based on the premise that most genes on the array will not be differentially expressed, and therefore the arithmetic mean of the ratios from every feature on a given array should be equal to 1. If the mean is not 1, a value is computed which represents the amount by which the ratio data should be scaled such that the mean value returns to 1. This value is the normalization factor.

Another method is to choose a subset of the features on an image as control features. All substances change expression levels under different conditions. Normalization control features should be selected based on their consistent behavior in all experimental conditions used on your arrays, not on their historical use as “housekeeping genes” in other molecular biology techniques. For example, the control spots might be such that each is expected to have a ratio of 1. Hence the mean of the control features should be 1. Assuming that variations are uniform across the array, a single normalization factor can be calculated from these features and then applied to the whole array.

Normalizing

Having chosen a normalization method, it must be implemented in software.

GenePix Pro employs a global normalization method, in which images and Results are normalized together. If the current Results are not derived from the current images (*i.e.*, if they are not *linked*), then Results data are normalized alone; see Chapter 4, “Linkage”. You can always remove normalization to return to your original images.

Because ratios are not normally distributed, GenePix Pro first takes the log of each ratio value when normalizing. The mean \bar{x} of a set of n ratios $\{x\}$ is therefore:

$$\bar{x} = \exp\left(\frac{1}{n} \sum_{i=1}^n \ln x_i\right)$$

Ratio values less than 0.1 or greater than 10 are excluded from the calculation, as are features flagged *Bad*, *Absent* or *Not Found*.

Four-color normalization is done on a ratio-by-ratio basis. For example, if you choose to normalize so that the mean of the Ratio of Medians is set to 1.0, each Ratio of Medians data type that you have defined in the *Options / Analysis / Ratio Formulation* dialog box is normalized independently.

To calculate the wavelength-specific normalization factors that are reported in the Results Header, the change to the ratio is distributed equally between the wavelengths, so one wavelength scales up by the square root of the ratio scale factor and the other scales down.

For example, suppose the mean of Ratio of Medians of 635/532 is 1.21. The square root of 1.21 is 1.1, so we set the scale factor for the 532 wavelength to 1.1, and the scale factor for the 635 wavelength to $1/1.1 = 0.91$. After applying these scale factors, the new mean of the Ratio of Medians is $1.21 * 0.91 / 1.1 = 1.0$.

Because normalization can scale up the data, it is possible for normalization to produce pixels with intensities greater than the hardware limit of 65535.

GenePix Pro File Formats

GenePix Pro 6.0 recognizes and uses several different file types. Detailed descriptions of the file formats used by GenePix Pro can be found on our website at:

http://www.axon.com/GN_GenePix_File_Formats.html

ATF—Axon Text File Format (*.atf)

This is a tab-delimited text file format that can be read by typical spreadsheet programs such as Microsoft Excel. It is used for GenePix Array List (GAL) files, and GenePix Results (GPR) files (see following page).

An ATF text file consists of records. The group of records at the beginning of the file is called the file header. The file header describes the file structure and includes column titles, units, and comments. Each line in the text file is a record. Each record may consist of several fields, separated by a field separator or column delimiter. The tab and comma characters are field separators. Space characters around a tab or comma are ignored and considered part of the field separator. Text strings are enclosed in quotation marks to ensure that any embedded spaces, commas and tabs are not mistaken for field separators.

GAL—GenePix Array List File (*.gal)

The GenePix array list file conforms to the Axon Text File (ATF) format. The GenePix array list file contains entries to describe the layout of each block, and to assign names and identifiers (IDs) to each feature on an array. New to GenePix Pro 6.0 is the ability to read GAL files with user-defined data columns beyond the usual five; information in user-defined columns is preserved and written to the GPR file when Results are saved. See the on-line Help for more details.

GPA—GenePix Settings File Settings (*.gpa)

Settings for batch scanning (which GPS or GAL file to use, Auto PMT setting, etc, for each slide) are saved as a binary file.

GPR—GenePix Results File (*.gpr)

Results data are saved as GPR files, which are in Axon Text File (ATF) format (see previous page). The results file contains general information about image acquisition and analysis, as well as the data extracted from each individual feature. Results can be saved with the entire table in a single GPR file, or with each block in a separate GPR file.

GPL—GenePix Lab Book File (*.gpl)

The GenePix Lab Book is a binary file, so the user cannot edit it. See Chapter 4, Section 3, *Special Functions*, for information on using the Lab Book.

GPS—GenePix Settings File (*.gps)

GenePix Pro acquisition, analysis and display settings are saved as binary GenePix Settings Files. Settings are organized into several different categories (acquisition, analysis and display) all of which are saved together in the GPS file. However, when opening a settings file you can choose which subset of the settings you want to open.

Acquisition settings include which laser was enabled during the acquisition, the PMT Gain settings, the lines averaged, and the scan area. Analysis settings include the location and identification of blocks and feature-indicators that were defined on the image. Display settings include brightness and contrast settings, and the ratio color mapping.

GPS files and GAL files both contain block and feature geometry, and both can be used to apply a grid template to an image. However, a GAL file does not contain the acquisition and display settings that are saved in a GPS file.

JPEG—Joint Photographic Experts Group (*.jpg)

Images can be saved in the JPEG format, which is a lossy, compressed image file format. That is, it removes some information from the image as it makes the image much smaller than an image saved in a non-lossy format such as TIFF.

GenePix Pro implements minimal JPEG compression, which is enough to reduce image file size significantly, but which removes only a small amount of data from the image. However, we recommend that you do not use the JPEG format to archive images that are to be analyzed later. Rather, use the JPEG format to store images that are to be used in presentations.

TIFF—Tagged Image File Format (*.tif)

Images acquired in GenePix Pro are by default saved in the TIFF format. This is a standard, uncompressed graphic file format that can be read by many graphics and imaging programs. The primary data acquired by GenePix Pro are the single-wavelength images, and by default these are saved as 16-bit grayscale TIFFs in a single multi-image TIFF file. Not all graphics applications can read multi-image TIFF files. You may want to try opening a multi-image file with your preferred graphics application to see if they are supported. If not, save the single-wavelength images as separate single-image files.

GenePix Pro exports its preview and pseudocolor ratio images as 24-bit color TIFFs, but it does not read them, as data are not extracted from them.

Chapter 4

Tutorial

This tutorial guides you through loading your first array and scanning your first array image. It also leads you through a basic array analysis, and describes more advanced GenePix Pro functionality.

The tutorial is organized into three main sections.

Image Acquisition

Image Acquisition begins with starting the GenePix scanner and takes you through to scanning an array and saving your images. If you are using GenePix Pro as a standalone application, you may want to skip this section.

Image Analysis

Image Analysis begins with loading an image into GenePix Pro, and takes you through all the analysis steps required to extract data from the image.

Special Functions

Special Functions describes all the special features in GenePix Pro that you may use regularly.

Using the On-line Help

If you require more information about details of the GenePix Pro software interface, consult the on-line Help, which you can do at any time from within GenePix Pro by pressing <F1>.



If you would like more information about the technical details behind the GenePix array scanning system, consult Chapter 3 above, or Chapter 4 in the *User's Guide* for your GenePix scanner.

Image Acquisition

Starting GenePix Pro

If you have not yet performed the GenePix scanner installation, refer to the *User's Guide* for your scanner.

The GenePix scanner must be running before your computer is powered up so that the computer can identify that the scanner is connected and operational.

IMPORTANT: After power-on, give the scanner 15 minutes to warm up before acquiring any images with it. This allows time for the lasers' output to stabilize.

GenePix Pro Analysis Only Mode

During the installation of GenePix Pro, one of the icons created in the Start menu group is labeled "GenePix Pro 6.0 (Analysis Only)". Both versions provide exactly the same functionality, except that the Analysis Only version does not interact with the GenePix scanner.

Note: In previous versions of GenePix Pro, 'Analysis Only' mode was referred to as 'Demo mode'.

You may want to use the Analysis Only version in several circumstances:

- You can use the Analysis Only version to mimic the scanning process if you do not have a scanner available as you go through this Tutorial. Pressing a scan button in the Analysis Only version displays a demo image that can be used for this Tutorial. The GenePix Pro installation includes all the necessary settings and analysis files to accompany the demo image.
- If you are acquiring image data with one computer and then performing analyses on another, running the hardware-interactive version on the computer without the scanner results in prompts about the scanner not being attached. When running the Analysis Only version you have full analysis functionality without having to worry about scanner connections.
- If you are acquiring and analyzing on the same computer, there is an advantage in using the Analysis Only version only for analyses, particularly if they are lengthy. While the hardware-interactive version of GenePix Pro is running, the scanner's lasers are fully powered (although the lasers power down if the scanner is left idle for two hours). Exiting from the hardware-interactive GenePix Pro software powers down the lasers on the scanner immediately. In the long term, switching to the Analysis Only version for analyses may extend the lasers' operating lifetime.

Performing a Preview Scan

For information on inserting and removing arrays, please refer to the *User's Guide* for your scanner.

Use a 40 μm Preview Scan to find the area on the array that you want to scan at high resolution. After completing a Preview Scan, you typically set a Scan Area and then do a high resolution Data Scan.

To perform a Preview Scan:

- Launch the GenePix Pro software.
- Insert a slide *with the arrayed features facing down*.
- Press the *Preview Scan* button on the right-hand side of the GenePix Pro main window.



GenePix Pro can be configured so that after a Preview Scan, it reads the barcode from the slide automatically:

- Click the *Options* button on the right-hand side of the GenePix Pro main window.
- Click the *Workflow* tab.
- Check for Search for a barcode after each data scan or image load check box.



The barcode is reported in the “B:” field in the Status Bar at the bottom of the GenePix Pro main window.

Drawing a Scan Area

Once you have a Preview Scan, you can draw a Scan Area around the features on your array. This area only is scanned during a Data Scan (see below). If you do not draw a Scan Area, the whole slide is scanned during the Data Scan.

To draw a Scan Area:

- Select the *Scan Area* tool from the *Tools* group on the left-hand side of the Image tab.
- Move the mouse cursor to the top left of the features on the image.
- Hold down the mouse cursor and drag a rectangle around the region containing the features.
- Press <5> if you want to zoom in to the Scan Area.



Performing a Data Scan

A Data Scan is a high-resolution scan that is used for data analysis. Data Scans can be done at several different pixel sizes (resolutions) from 5 μm to 100 μm .

Scanning at 5 μm is useful primarily for analysis of features smaller than about 100 μm in diameter. A 100 μm feature scanned with 10 μm pixels contains about 78 pixels, which is sufficient for an accurate intensity measurement. For features larger than 100 μm , the negligible difference in accuracy is unlikely to justify the four-fold increase in file size and the two-fold increase in scan time required by a 5 μm scan.

To change the resolution for a Data Scan:

- Press the *Hardware Settings* button on the right-hand side of the GenePix Pro main window.
- Use the spinner buttons to change the value in the *Pixel Size* field.

To perform a Data Scan:

- Press the *Data Scan* button on the right-hand side of the GenePix Pro main window.



During scanning, all of the image display controls and zooming functions are fully operational. See “Image Analysis” section.

Performing a Single Wavelength Scan

If you have scanned two, three or four wavelengths (depending on your model scanner), and one of the wavelengths scans was done at an incorrect PMT setting, for example, you can use a *Single Wavelength Scan* to scan just that wavelength again, while retaining all the other wavelengths.

To use Single Wavelength Scan:

- Specify the wavelength to scan by selecting it in the *Image* group at the top left of the Image tab.
- Click the *Single Wavelength Scan* button.



Note: When you perform a single wavelength, scan the original image for that wavelength is overwritten.

Optimizing Scanner Settings

The *Hardware Settings* dialog box controls many different scanner settings, such as PMT gain, laser power (GenePix 4000 scanners), filter selection (GenePix 4100 scanners), pixel size (resolution), lines to average and focus position.

Maximizing the Dynamic Range of a Scan

The complete dynamic range of the scanner is being used when you see a range of intensities on the image from 1 to 65535. A pixel with an intensity of 65535 is “saturated”. Saturated pixels represent a condition in which there are more photons detected than the PMT can process, or the output of the PMTs exceeds the range of the analog-to-digital converters. A saturated pixel is not an accurate measurement of the signal from the pixel, so it is imperative to set the PMT Gain to avoid saturation.

Saturated pixels are drawn as white on the image, and appear on the far right of the histogram (on the Histogram tab: See Section 3, *Special Functions*).

To maximize the dynamic range of your scanner for a slide:

- Open the *Hardware Settings* dialog box. This dialog box can stay open while scanning.
- Start a Preview Scan by clicking the *Preview Scan* button.
- While scanning, increase the PMT gain for each wavelength with the *PMT Gain* spinner controls until there are no pixels that are saturating in each single wavelength image.

Balancing PMTs

The ideal scan is one in which the same amount of red and green signal is acquired in each channel, resulting in a pixel ratio of approximately 1.0. Post-acquisition normalization can correct for variations in relative signal intensities,

so scanner settings need only approximate a ratio of 1.0. Balancing the two channels by eye is often sufficient.

To Balance PMTs:

- Open the *Hardware Settings* dialog box. This dialog box can stay open while scanning.
- Start a Preview Scan by clicking the *Preview Scan* button.
- Zoom in to the part of the image that contains the features.
- Switch to the Histogram tab.
- Set the *Min* and *Max Intensity* (Image Balance) fields to 500 and 65530, respectively.
- The *Count Ratio* field at the bottom left of the Histogram tab reports the ratio of counts in each channel. While scanning, adjust the PMT Gain in each channel until this ratio is about 1.0.

See “Special Functions” below for more details on using the Histogram tab.

Automatically Balancing PMTs

Instead of manually adjusting the PMT gain to maximize the dynamic range of your and balance the signal from the channels, you can use the automatic PMT balancing routine.

PMT balancing is more effective if your scanner is calibrated (see Calibrate System in the “Special Functions” section below).

To use this routine you need to have a GAL or GPS file for the slide that is approximately positioned on blocks of features on the slide. The GAL file should also have accurate default feature diameters. Any good GAL file will be correctly positioned, even before any manual editing or spot finding.

- Open the *Hardware Settings* dialog box. This dialog box can stay open while scanning.
- Click the *Set PMT Gain* button.

- Select the amount of saturation (in terms of the percentage of pixels) that is allowed in the scanned image. We do not recommend setting zero saturation, as a bright artifact on the image can cause the rest of the image to be scaled so that it is very dim. The default saturation of 0.005% is recommended for most slides.
- There is an option to begin from the current PMT gain. If this option is not checked, then the algorithm begins with a gain of 350. We recommend not beginning from current PMT gain settings, as the algorithm is much more effective when starting with low PMT gain than with high PMT gain.
- Click *Start*.

The routine performs a number of Preview Scans at different PMT gain settings. When it is finished, it recommends PMT gain settings to be used for your Data Scan:

- To accept those gain settings click the *Apply* button.
- To revert to the original gain settings, click *Cancel*.

Using Line Averaging

To maximize the signal-to-noise you may want to average multiple lines. If you set *Lines to average* to 2, for example, the scanner scans each line twice and averages the value. Keep in mind that as you increase the amount of line averaging you correspondingly increase the amount of time needed to complete each scan. For example, averaging two lines doubles the scan time.

To average more than one line in a Data Scan:

- Open the *Hardware Settings* dialog box. This dialog box can stay open while scanning.
- Change the *Lines to average* field to the number of lines that you want to average (e.g., 2).
- Start a Data Scan by clicking the *Data Scan* button on the right-hand side of the GenePix Pro main window.

Changing Filter Selection

The Hardware Settings dialog box displays the filter selection field only if your GenePix scanner supports the installation of additional custom filters. Only the currently installed filters are displayed.

The emission filters that come installed as standard in your scanner are optimized for use with specific fluorophores—for instance the factory-installed filters in the GenePix 4100A scanner are optimized for use with Cy3 (excited by 532 nm laser) and Cy5 (excited by 635 nm laser). You may want to install additional filters if you are using dyes with emission characteristics different from those for which the standard filters are designed.

If additional emission filters have been installed on your scanner, you can select which filter is used with which wavelength laser scan.

To change filter selection:

- Open the *Hardware Settings* dialog box.
- Change the *Filter* field for each wavelength to the desired filter.

Changing Laser Power

The Hardware Settings dialog box displays laser power adjustment only if your GenePix scanner is equipped with this feature.

You may want to reduce the laser power to avoid photobleaching if you have a particularly photosensitive sample, or if you need to scan a slide more than once, for example when fine-tuning focal plane adjustments. (Some dyes, such as Cy5, are particularly prone to photobleaching.) However, reducing laser power also reduces signal-to-noise ratio.

Laser power cannot be adjusted while the scan is in progress.

To change the laser power:

- Open the *Hardware Settings* dialog box.
- Change the *Power* field for each wavelength to the desired value.

Changing Focus Position

The Hardware Settings dialog box displays focus position adjustment only if your GenePix scanner is equipped with this feature.

You can change the focal point from $-50\ \mu\text{m}$ to $+200\ \mu\text{m}$ relative to the zero position, where a negative value is towards the slide.

You may choose to focus manually for any sample with appreciable thickness, such as one with a cover slip. The best focus position is that at which the intensity is maximized.

Photobleaching may be a problem if you scan repeatedly to find the right focal point. If you are scanning repeatedly, you may want to reduce laser power.

The focal plane can be adjusted while the scan is in progress.

To change the focus position:

- Open the *Hardware Settings* dialog box.
- Change the *Focus position* field to the desired value.

Saving Hardware Settings

You can save your acquisition settings, as well as analysis and display parameters, in a GenePix Settings (GPS) file. These settings can be opened later for use on other slides.

To save settings:

- Click the *File...* button on the right-hand side of the GenePix Pro main window:
- Select *Save Settings As*.
- From the *Save as type* field, select GenePix Settings File (*.gps).
- Type in a file name and click *Save*.



Saving Images

Once your array has been scanned, the next step is to save the images.

Choosing A File Format

By default, all images created in GenePix Pro are saved as 16-bit multi-image TIFF files. Each multi-image TIFF file contains the images of the individual wavelengths scanned. The ratio image is not saved because it is recomputed when the multi-image TIFF file is opened in GenePix Pro.

To save images as multi-image TIFFs:

- Click the *File...* button on the right-hand side of the GenePix Pro main window.
- Select *Save Images*.
- From the *Save as type* field, select Multi-image TIFF Files.
- Click the *Save* button.

GenePix Pro also provides the option to save each image component of the acquired image as a separate TIFF file. There are several reasons why you may want to do this:

- Some graphics applications cannot read multi-image TIFF files; if you use one of these, you have to save the images separately if you are going to import them into such a program.
- You may want to save just the ratio image for presentation purposes. You can only save the ratio as a single-image file; it is not saved in the multi-image TIFF file.

It is important to realize that *if you do not save the raw wavelength images, i.e., if you save only the ratio image, future analysis is impossible.*

To save images as single-image TIFFs:

- Click the *File...* button on the right-hand side of the GenePix Pro main window.
- Select *Save Images*.
- From the *Save as type* field, select Single-image TIFF Files.
- Click the check boxes to select the images to save.
- Click the *Save* button.

We recommend that for all data analysis purposes you save your images as multi-image TIFF files. However, GenePix Pro also lets you export images in the JPEG format. We recommend that you do not use the JPEG format to archive images; use it only for presentation purposes where image quantitation is not required.

To export images as JPEGs:

- Click the *File...* button on the right-hand side of the GenePix Pro main window.
- Select *Export Images*.
- Enter a file name for your images.
- Click the check boxes to select the images to export.
- Click the *Save* button.

Images saved in the JPEG format cannot be re-opened in GenePix Pro.

Setting File Names

GenePix Pro provides you with several options to generate file names automatically when saving images.

To set automatic file names:

- Click the *File...* button on the right-hand side of the GenePix Pro main window.

- Select *Save Images*.
- In the *Naming* group.
- Check the *Date Prefix* option to prefix the file name with the current date (YYYY-MM-DD).
- Check the *Numeric Suffix* option to add a four-digit suffix to the file name, where numbering begins at ‘0000’.
- Check the *Barcode Prefix* option to prefix the file name with any barcode symbols from your image.
- Check the *User Name* option to add the GenePix Pro user name to the front of a file name (you can set GenePix Pro to be opened by user name; see “Workflow Automation Options”).

GenePix Pro controls the last few characters of the file name, which are reserved to indicate a file number, and the type of image if separate image files are being created. When saving single-wavelength images as either TIFFs or JPEGs, GenePix Pro adds the wavelength of the image as a suffix to the file name.

Image Analysis

Once an image has been acquired, the next step is to view the image and measure the signal intensity of each feature.

Selecting a Color Mode

GenePix Pro 6.0 can be launched in two different modes, for two-color analysis or four-color analysis. In two-color mode, you can load two single-wavelength images and define one ratio. In four-color mode, you can load up to four single-wavelength images, and define up to three independent ratios.

To change color mode:

- Click the *Options* button on the right-hand side of the GenePix Pro main window.



- Click the *Display* tab.
- To run in four-color mode, check the *Four-color mode* box.
- To run in two-color mode, uncheck the *Four-color mode* box.

To change color mode, you have to shut down GenePix Pro and restart it.

Opening an Image

If you have just acquired an image, it will be displayed on the screen ready for you to analyze it. (If you want to save an image that has just been scanned, be sure to do so before proceeding with analysis.) Alternatively, you can open a previously saved image or one of the sample images provided on the GenePix Pro CD.

To open an image:

- Click the *File...* button on the right-hand side of the GenePix Pro main window.
- Select *Open Images*.
- Navigate to a directory that contains previously saved TIFF images. For example, open one of the sample TIFF files in the “Axon\Data” directory.
- Select the images and click the *Open* button.

Opening Images in Four-color Mode

To produce a sensible ratio image, images must be acquired with the same Scan Area (*i.e.*, with the same Settings file) and at the same resolution.

To open three or four images in four-color mode:

- Start GenePix Pro in four-color mode.
- Click the *File...* button on the right-hand side of the GenePix Pro main window.
- Select *Open Images*.

- Navigate to a directory that contains previously saved TIFF images. For example, open one of the sample TIFF files found in the “Axon\Data” directory.
- Hold down the <Ctrl> key to select multiple images.
- Click the *Open* button.
- GenePix Pro displays the *Assign Image* dialog box. For each image, assign a wavelength and a color.

If the images were acquired on GenePix scanner, GenePix Pro will automatically recognize the wavelengths used for each channel. You can avoid the *Assign Images* dialog box by clicking off the *Enable User Assigned Wavelengths and Channels* checkbox in the *Open Image/Options* dialog box. You can also override the actual values (for example to do ratio analysis of two images both scanned with the red laser) by clicking on the checkbox and entering any wavelength values you choose.

Registering Images

Images acquired from more than one scanner, or acquired sequentially (instead of simultaneously) may need to be registered (aligned) before they can be analyzed.

If images are misregistered, you can register them by hand, or allow GenePix Pro to register them automatically.

To register automatically:

- Click the *Image Tools* button on the Image tab.
- If your images are very badly misregistered, say greater than 10 pixels, you will need to set a starting offset for the registration algorithm.
- Click *OK*.
- If the registration fails, perform it again, but specify starting offsets.

To register manually:

- Zoom in to the image so that you can see one or two features only.
- Click the *Image Tools* button on the Image tab.

- Click *Register 635 to 532*.
- The cursor on the image is now a hand, and you can drag the red image relative to the green image. Move the red image until it is aligned with the green image.
- Click the green button at the top of the image to accept the changes.

In four-color mode, the procedure is similar, except that you must choose a Base Wavelength (*i.e.*, the image to which the others are being aligned) and specify three sets of offsets.

Rotating Images

GenePix Pro 6.0 supports image rotation in 90-degree steps. To rotate an image:

- Click the *Image Tools* button on the Image tab.
- Select one of the *Rotate* commands to rotate the specified number of degrees.
- After rotating an image you may wish to save it using the *Save Images* command under the *File* menu on the right-hand side of the GenePix Pro main window.

Customizing Ratio Formulation

The ratio formulation specifies which image is the numerator and which is the denominator for each ratio image. In two-color mode this is a simple binary choice, but in four-color mode there are many more choices.

For example, if you have four images numbered 1 to 4, your ratio images could be 1/2, 1/3 and 1/4, or they could be 1/2, 2/3 and 3/4, which is a very different experiment.

To change the ratio formulation:

- Click the *Options* button on the right-hand side of the GenePix Pro main window.

- Click the *Analysis* tab.
- Click the *Select* button in the *Ratio Formulation* group.
- In two-color mode, switch to the reciprocal ratio formulation.
- In four-color mode, check up to three ratios.

In four-color mode it is possible to select a set of ratios where one of the ratios can be expressed as a product of the others. This is known as a *dependent* set of ratios, and the set cannot be normalized. For example, 1/2, 2/3, and 3/1 is a dependent set. If you want to be able to normalize your data, use an independent set of ratios, such as 2/1, 3/1, 4/1.

Image Display and Color Control

GenePix Pro has many commands with which you can change the display of the image.

To switch between single-wavelength and ratio images:

- Click the image name buttons in the *Image* group at the top left of the Image tab, or use the Hot Keys <Alt+W> or <Alt+Shift+W> to display the next or previous image in the list, respectively.

To change the single-wavelength and ratio colors:

- Click the *Color* button in the *Tools* group on the Image tab.
- Select from the list of wavelength color combinations at the top of the menu.







Color

These image display controls are also available in real time during an acquisition. It is worth experimenting a little with the various display settings to find those with which you are most comfortable. For example, green–blue with inverted color is good for distinguishing features from background at high magnifications.

To invert colors:

- Click the *Color* button in the *Tools* group on the Image tab;
- Select *Invert Color* from the menu.

To change the brightness and contrast of the image:

- Click the *Auto Scale Display Settings*  button to set brightness and contrast to their optimum settings;
- Move the individual brightness  and contrast  sliders for custom settings.
- Click the *Reset*  button to return brightness and contrast to their defaults.

Zooming the Display

GenePix Pro has several sophisticated controls for magnifying an image.

To increase the magnification of the image being displayed:

- Select *Zoom Mode* from the *Tools* group on the left-hand side of the Image tab, or use the Hot Key <Z>.
- Draw a rectangle around the area that you would like to view at higher magnification.

To return to the previous magnification:

- Click the *Undo Zoom* button from the *Tools* group on the left-hand side of the Image tab.

To view the image at full magnification:

- Click the *Full Scale* button on from the *Tools* group on the left-hand side of the Image tab, or use the Hot Key <Alt+F>.



Using the Navigation Window

The *Navigation* window displays a greatly reduced image of the entire scanned area with the current zoomed area bounded by a resizable Navigation region.

To move around the image using the Navigation window:

- Zoom in to a region of the image using the *Zoom* tool.
- Click the *Navigation window* button in the *Tools* group on the



left-hand side of the Image tab.

Hold down the mouse cursor in the Navigation region of the Navigation window, and drag it to the part of the image that you want to see.

To zoom with the Navigation window:

- Click the *Navigation window* button in the *Tools* group on the left-hand side of the Image tab.
- Place the mouse cursor over a corner of the Navigation region until it turns into a four-way arrow cursor.
- Drag the corner in or out to zoom in or zoom out on the image.

Using the Feature Viewer

The *Feature Viewer* is at the left of the Image tab. It displays a zoomed view of the image that is currently under the mouse cursor. It also reports important information about each feature, such as the (x, y) coordinates of the cursor, and various ratio and intensity values.

Once an analysis array has been created (see the next section, “Creating and Using an Analysis Array”), when the mouse is placed over a feature-indicator the Feature Viewer reports the intensity of the pixels within the feature-indicator, its associated background intensity level, the precise location of the feature-indicator in the analysis array, and substance IDs or names that have been defined for each feature.

To change the magnification of the Feature Viewer:

- Click the *Options* button on the right-hand side of the GenePix Pro main window.
- Click the *Display* tab.
- Change the *Field of View* field to the new value.

To hide feature indicators in the Feature Viewer display:

- Click the *Options* button on the right-hand side of the GenePix Pro main window.

- Click the *Display* tab
- Uncheck the *Show feature-indicators* box and click *OK*.

To undock the Feature Viewer in four-color mode:

- Start GenePix Pro 6.0 in four-color mode.
- Click the *Options* button on the right-hand side of the GenePix Pro main window.
- Click the *Display* tab.
- Uncheck the *Docked* check box, and click *OK*.

Creating and Using an Analysis Array

In order to measure the intensity of individual features you must create an analysis array, which defines the dimensions and location of each feature. A detailed discussion of the algorithms used by the array can be found in Chapter 3.

Spots, Features, Blocks and Arrays

In GenePix Pro each individual spot that is deposited on a slide is assigned a *feature-indicator*. A grid of feature-indicators is called a *block*. There can be several blocks on a single array, depending upon the type and configuration of the arrayer that was used to place the spots on the slide. Shown right is a small hypothetical 400-feature array, composed of four blocks, each with 100 features.

Example 1: Using a GAL File to Create Blocks

GenePix Pro can automatically generate blocks using information that is contained in a GenePix Array List (GAL) file. GAL files are used to link the information from the arraying process to the analysis. They speed the analysis process and add a great deal to the data that are extracted from the array. For example, when a GAL file is imported, the Feature Viewer reports the substance ID or name associated with a feature when the mouse is placed over it, and an Analysis operation exports these names to the Results tab together with all other extracted data.

To create blocks from a GAL file for the demo images:

- Click the *File...* button on the right-hand side of the GenePix Pro main window.
- Select the Load Array List command.
- Select “demo.gal”, the demo GAL file.
- Click *Open*.

This procedure automatically creates blocks, and assigns substance names and identifiers (if they are in the GAL file) to each spot.

To create a new GAL file for a real slide, see “Importing Clone Information” on the following page.

Example 2: Manual Block Creation

To create blocks manually:

- Click the *New Blocks* button in the Tools group on the left-hand side of the Image tab.
- In the *Blocks* group at the top of the dialog box, enter the number of blocks that you would like to use by specifying the number of rows and columns of the array of blocks. For example, to create a 4×4 array of blocks, enter 4 for the number of columns and 4 for the number of rows.
- To determine the position of the blocks, specify the distance between them (see Figure 3). If you do not have these distances from your array manufacturer or spotter, you can measure these distances directly from the array image using the X and Y coordinates reported in the Feature Viewer.

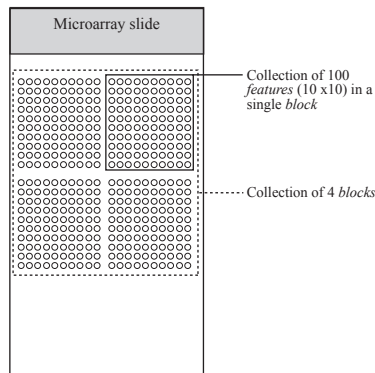


Figure 2. Hypothetical array of blocks.



- Specify the layout of the individual feature-indicators in each block (see Figure 3).

Don't worry too much about initially getting the spacing precisely correct. You can quickly adjust the spacing by stretching the block corners with the mouse, or by using the equivalent keyboard shortcuts.

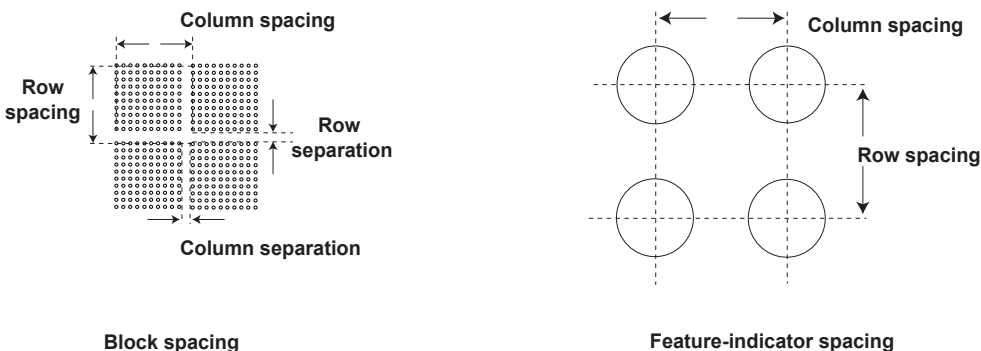



Figure 3. Block and feature-indicator spacing.

Example 3: Manual Block Creation in Replicate Mode

Instead of creating a full array of blocks, it sometimes easier to create one block and then copy it.

To use Replicate Block mode:

- Create a single block using the *New Blocks* dialog box as described on the previous page.
- Select *Replicate Mode*  from *Tools* group on the left-hand side of the Image tab.
- Click on the top left feature of each block of features, and a block is created wherever you click.

Importing Clone Information

In GenePix Pro clone information, such as substance IDs and names, is imported using a GenePix Array List (GAL file), which also creates blocks. You can create

GAL files in several different ways. Some arrayer software writes out GAL files with clone information. If you are buying slides from your array manufacturer, they will supply you with a GAL file for the array.

Example 1: Creating a GAL File from Current Settings

If you create a GAL file in this way, you need to add substance IDs and names manually in a spreadsheet such as Microsoft Excel.

To create a GAL file from your current analysis (block) settings:

- Create blocks as described previously.
- Click the *File...* button from the right-hand side of the GenePix Pro main window.
- Select *Save Settings As*.
- From the *Save as type* list, select GenePix Array List Files.
- Click *Save*.

Example 2: Creating a GAL File with the Array List Generator

The GenePix Array List Generator converts plain text files or ATF files containing substance names and IDs into GenePix Array List (GAL) files. The Array List Generator is specifically designed to make GAL file creation simple. It checks and validates GAL files for you, and it previews the array of blocks defined by your GAL file. From the Array List Generator you can also open the Well Converter, with which you can convert four 96-well plate files into a 384-well plate file. See “Creating and Aligning Blocks and Feature-Indicators” in Chapter 3 for the types of arrays to which the Array List Generator applies.

When GenePix Pro is installed, several sample 384-well plate and 96-well plate files are copied to your ...*\Axon\Params* directory so that you can learn how to use the Array List Generator and Well Converter. You may want to open one of the “384 Plate...” text files with a text editor such as Notepad to see the file format for yourself: it is simply contains the row and column indices, and names, for each of the wells on a plate.

To create a GAL file with the Array List Generator from the sample text files:

- Click the *Array List Generator* button on the right-hand side of the GenePix Pro main window.
- Click the *Add* button.
- If you have 96-well plate files, use the *Well Converter* to convert them into 384-well plate files. Open the *Well Converter* from its button in the Array List Generator. *Well Converter* is explained fully in the on-line Help.
- GAL files can also be opened and edited in Microsoft Excel to make minor additions or other modifications.



Aligning Blocks on an Image

GenePix Pro uses three sets of alignment algorithms: one for finding the entire array of features, one for finding the location of complete blocks of feature-indicators on an image, and one for aligning the feature-indicators within the blocks with features on the image.

Find Array pre-positions the whole array of blocks over the array on the image.

Find Blocks places each block in its optimal starting position for the alignment of features, and it estimates rotation and skew, and row and column separation for each block. It does not move individual feature-indicators within blocks.



Align Features, which aligns each feature-indicator with the nearest feature, works best when the initial position of a block satisfies the following two criteria:

- each feature-indicator partially overlaps its associated feature (*e.g.*, about half a feature-indicator diameter overlap);
- the feature-indicator diameter is slightly smaller than the average feature diameter.

The combination of these three procedures is highly robust and reliable, so we recommend using the global command *Find Array, Find All Blocks, Align Features*, or the hot key <F8>.

If your slide has features with a range of sizes, you can change the maximum and minimum diameters used by the spot-finding algorithm:

- Click the *Options* button on the right-hand side of the GenePix Pro main window.
- Click the *Alignment* tab.
- Enter the *Min diameter* and *Max diameter* as percentages of the starting diameter of each feature.

You can disable diameter-resizing altogether during *Auto Aligns* by unchecking the *Resize features during alignment* check box.

Once an automatic alignment is completed, you may need to review block and feature positions and make some manual adjustments. To operate on blocks manually you need to be in *Block* mode (Hot Key).

Non-circular Feature-indicators

GenePix Pro supports square and irregular feature-indicators, as well as the default circular feature indicators. To use this feature:

- Open the *Options / Alignment* dialog box.
- Select *Find Square Features* or *Find Irregular Features*.

If you are using irregular features, you can choose to fill in holes in features, or find the holes as well. To use this option:

- Open the *Options / Alignment* dialog box.
- To find holes in irregular features, uncheck the *Fill Irregular Features* option.

If you use irregular features, after analysis you can use the *Circularity* column in the *Results* tab as a quality control measure on your features. *Circularity* ranges from 0 (non-circular) to 100 (circular). Squares features are always given a value of 79 ($100 \times \pi/4$).

Zooming in on Blocks

While you can use the *Zoom Area* tool for zooming, GenePix Pro has several special zooming functions for use with blocks.

To use these special functions:

- Select a single block.
- Use <1> to zoom in to the top left quadrant of the selected block.
- Use <2> to zoom in to the top right corner.
- Use <3> to zoom in to the bottom left corner.
- Use <4> to zoom in to the bottom right corner.
- Use <5> to zoom in to and center the whole block.
- Use <> and << to zoom in to the next or previous block.

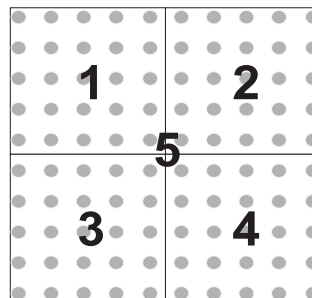


Figure 4. Zooming Hot Keys.

Once you have zoomed the block so that you can see the location of feature-indicators and how well they align with features in the image, you can move the block either by dragging it using the mouse, or with the arrow keys on the keyboard.

Moving and Resizing Blocks

Although the mouse is useful for quick and crude moving and resizing of blocks, for fine positioning it is often more efficient to use the keyboard controls:

- Select a single block.
- To move the block, use the arrow keys.
- To resize the block, use <Ctrl>+arrow keys.

Rotating Blocks

With a block selected, you can rotate it 0.1 degrees at a time with the <+> and <-> keys.

Manually Moving, Resizing, and Fine-tuning Feature-indicators

After an *Align Blocks*, you may want to fine-tune some of the feature positions manually. For example, it may be necessary to align manually features that are flagged *Not Found* by *Align Blocks*. This is easily accomplished using *Feature Mode*.

After selecting *Feature Mode* click on one, or many, feature-indicators that you would like to move or resize, and they are highlighted.

Feature mode has two sub-modes, rectangle and lasso, for making multiple selections. Once you are in Feature mode, click the Feature mode button again to display a choice of rectangle or lasso:

- In *Rectangle* mode, if you hold down the mouse and drag it, every feature in the bounding rectangle of the region is selected.
- In *Lasso* mode, hold down the mouse and draw an arbitrary closed region to select all the features in the region.

Feature selection also works when the blocks are defined by not displayed. You may find it easier to select irregular regions in lasso mode when the blocks are not displayed, as the image is more visible.

Use the arrow keys to move or resize them (these keys are also listed in the right mouse menu in Feature Mode):

- Select a feature or features.
- To move the feature(s), use the arrow keys.
- To resize the feature(s), use <Ctrl>+arrow keys or <Ctrl>+mouse wheel.

If you re-size or move an irregular feature-indicator then it is reset to circular. The diameters of feature-indicators are reported in the Results spreadsheet; for non-circular features, the diameter reported is the diameter of the circle of best fit. Irregular features also have a measure of circularity reported in the Circularity column, where 100 is circular and 0 is most non-circular. Feature-indicators should fit closely around features. Features that cut the boundary are not included.

Note: Feature Indicators cannot be moved or resized if the settings are Locked (see Section “Linkage”).

Quick Zooms

In *Feature mode* there are Quick Zoom hot keys that are similar to the Block mode Hot Keys:

- $\langle \text{Alt} \rangle$ +arrow keys: select previous or next feature;
- $\langle [\rangle$ or $\langle] \rangle$: move cursor to previous or next *selected* feature;
- $\langle 0 \rangle$ (zero): zoom and center current *selected* feature.

If images and Results are linked (see “Linkage” Section), then the $\langle 0 \rangle$ Hot Key on the Results or Scatter Plot tab switches the display to the Image tab:

- If a feature is highlighted on the Results tab, pressing $\langle 0 \rangle$ zooms to it on the Image tab.
- If a feature is under the mouse cursor on the Scatter Plot tab, $\langle 0 \rangle$ zooms to it on the Image tab.

Flagging Feature-indicators

GenePix Pro provides the ability to mark or *flag* individual feature-indicators. For example, you may find some features should be ignored during your final analysis because of imperfections on the array.

To flag a feature on the Image tab:

- Select *Feature mode* from the *Tools* group on the left-hand side of the Image tab.
- Select the feature to flag by clicking it.
- Click the *Feature* button on the right-hand side of the GenePix Pro main window, or bring up the right mouse menu on the feature.
- Select a flag to apply to the feature—*Good*, *Bad*, *Not Found* or *Absent*.



GenePix Pro also flags features automatically:

- If *Align Blocks* fails to find a feature, the feature is flagged *Not Found*.
- If there are blank entries in the active GAL file, the corresponding features are flagged *Absent*.

All flags are stored in the final Results table and are exported with numerical equivalents:

- *Good* is given the value 100.
- *Bad* is given the value -100.
- *Not Found* is -50.
- *Absent* is -75.
- *Unflagged* is 0.

See “Defining Your Own Flag Criteria” Section, for advanced feature-flagging techniques.

Note: Feature Flags cannot be removed or added if settings are Locked (see “Linkage” Section).

Resetting Flags and Positions

To remove the flags or nudges from feature-indicators:

- Select *Feature mode* from the *Tools* group on the left-hand side of the Image tab.
- Select the features to reset by clicking them, or by dragging a region around them.
- Click the *Feature* button on the right-hand side of the GenePix Pro main window, or bring up the right mouse menu on the feature.
- Select the command to apply: *Clear Nudges*, *Clear Flags*, or *Clear Flags Except Absent*.

Saving the Positions of Blocks and Feature-indicators

After you have finished aligning your analysis array, it is important to save its configuration:

- Click the *File..* button on the right hand side of the GenePix Pro main window.
- Select *Save Settings As* from the menu.
- Enter a file name for the settings and click *OK*.

When you save the settings, you not only save the position of the array, but you also save any acquisition settings you may have made such as the size and position of the scan region, and any display settings such as contrast and brightness.

Locking Settings

Once you have aligned the feature-indicators and applied any quality flags, you may want to lock your settings to prevent you from accidentally changing them after the Results have been calculated (see “Linkage” Section.)

To Lock Settings:

- Click the *Lock Settings* button from *Tools* group on the left-hand side of the Image tab.



When settings are locked, you cannot move blocks or feature-indicators, and several other commands (such as *Align Blocks* and *Align Images*) are disabled.

You can set the Locking default to Lock Settings automatically after an *Analyze* command:

- Click the *Options* button on the right-hand side of the GenePix Pro main window.
- Click the *Workflow* tab.
- Check the *Lock settings after analysis* check box.

You can manually lock and unlock the settings any time by clicking the *Lock Settings* button. Any change you make to your feature settings breaks their linkage with downstream results. To re-establish linkage, *Analyze* again.

Customizing Background Subtraction

GenePix Pro offers the choice of several background subtraction methods. By default, GenePix Pro uses a local background subtraction method (see “Computing Background Intensities” in Chapter 3). This is the recommended method, as it is much more responsive to background intensity variations across a slide. However, GenePix Pro does offer global methods, in which a single background value is used for each channel, for the whole slide.

To change the background subtraction method:

- Click the *Options* button on the right-hand side of the GenePix Pro main window.
- Click the *Analysis* tab.
- Click the *Select* button in the *Background Subtraction* group.
- Select a new background subtraction method.

Performing the Analysis and Viewing the Results

After aligning the analysis array, perform the analysis by pressing the *Analyze* button. The analysis extracts data from the single-wavelength images in each feature-indicator, and the results and subsequent computations are sent to the Results tab spreadsheet.



After the analysis a JPEG file of the image is saved and used in the Feature Viewer in the Results and Scatter Plot tabs. The image is saved with the brightness, contrast and color settings at the time of the analysis.

To save a JPEG to be used in the Feature Viewer with saved Results:

- Click the *File...* button on the right-hand side of the GenePix Pro main window.

- Click *Save Results As*.
- Check the *Save a JPEG image* check box.
- Click *Save*.

Using the Results Spreadsheet

In addition to the basic raw data and derived ratio measurements, the Results spreadsheet shows the location of each feature-indicator, substance information from the GAL file (such as substance names and ID), and any flags that were on the image before the analysis.

To sort the data in the spreadsheet, click on a column title. Click the same column title again to sort the data in the reverse order.

To group several discontinuous rows together:

- Select the rows by holding down the <Ctrl> key and clicking the rows.
- Press the *Group Rows* button.

To reorder columns:

- Click on a column title and drag it to a new position in the spreadsheet.

Alternatively:

- Click on the *Data Types* button in the *Table* group on the left-hand side of the Results tab.
- You can customize two different views of the spreadsheet. Select *Custom 1* or *Custom 2*, then select the Data Types you want in that view.
- Reorder columns by clicking the up and down arrows. For accelerated movement, hold down the button.
- Show and hide columns by moving them between the *Available Data Types* and *Visible Data Types* fields with the horizontal arrows. Note that grayed-out column names have no data in the active Results table, and are not displayed in the Results spreadsheet until they do have data.

- Click *Restore to Default* to display the standard GenePix Pro default of all applicable columns.

To show and hide rows based on their flags:

- Click the *Display* button in the *Table* group on the left-hand side of the Results tab.
- Check the flag types to display. For example, to show only features that are included in normalization, uncheck all the boxes in the *Excluded* column.

Note that settings in the *Display* dialog box do not change the underlying data set. A GPR file always contains the entire data set. To save results with a customized set of Data Types, choose *Export Results* from the *File...* menu.

Linkage

After an analysis your images, settings, and Results are *linked*, shown by the message “Ready – Linked” in the Status Bar at the bottom left of the GenePix Pro main window.

Linkage is the state of having the current Results match the current image and settings; *i.e.*, if you re-analyze you get exactly the same results. When linked, you can flag or select in any feature-viewing tab and the others are updated accordingly. “Locking” prevents your data from becoming unlinked.

To flag a feature on the Image tab, Results tab and Scatter Plot tab simultaneously:

- Ensure that “Linked” is displayed in the Status Bar at the bottom of the GenePix Pro main window.
- Select features on the Image tab, Results tab or Scatter Plot tab.
- Select a flag command from the right mouse menu, or from the *Feature* menu.

To navigate from the Results tab to the same feature on the Image tab when linked:

- Check that “Ready – Linked” is displayed in the Status Bar at the bottom left of the GenePix Pro main window.
- Click on the row of interest in the Results tab.

- Press the <0> Hot Key.

Results and images that are saved when linked can be opened all together simply by opening the Results file. GenePix Pro automatically locates and opens the corresponding image files.

To open linked images and Results:

- Click the *File...* button on the right-hand side of the GenePix Pro main window.
- Select *Open Results*.
- Check the *Open associated images* and *Recreate analysis settings* check boxes.
- Click *Open*.

If images and settings are opened and linked successfully, the Status Bar message at the bottom of the GenePix Pro main window reports “Linked”.

Web Interactivity

GenePix Pro 6.0 is closely integrated with the web. To look up a substance ID or name on a web database:

- Ensure that you have a GAL file or settings file loaded that contains substance names and IDs.
- Click the *Options* button on the right-hand side of the GenePix Pro main window.
- Click the *Analysis* tab.
- Select the address of a web database from the Web address list, or click *Manage* to enter a new web address.
- Click *OK*.
- Select a feature in the Image tab, Results tab or Scatter Plot tab.
- Click the right mouse menu and select *Go To Web* to open the database in your default web browser.

Normalization

GenePix Pro 6.0 includes full normalization of images and data (see “Data Normalization” in Chapter 3). If images and Results are linked, then both images and Results will be normalized; if they are not linked, only the Results will be normalized. When linked, the GenePix Pro Status Bar reports “Linked”.

Before you normalize, you must decide to normalize on control features only, or on all features, or you can choose to apply your own normalization factors to the images.

To configure normalization so that you normalize on all features (excluding those flagged *Bad*, *Absent* and *Not Found*):

- Click the *Configure* button in the *Normalization* group on the left-hand side of the Results tab.
- Click the *Ratio-based* button at the top of the dialog box.
- From the *mean of the* list box, select a ratio type. Typically, this is the main ratio value that you use for all your analyses.
- Select *all of the features* from the second list box.
- In the *is equal to* field, enter a ratio value. By normalizing on all features, you are assuming that the mean ratio of all features on the array is equal to 1, so enter 1 in this field.

To configure normalization so that you normalize on selected features only:

- Flag features for normalization with an *Include in Normalization* flag. See “Defining Your Own Flagging Criteria” Section.
- Click the *Configure* button in the *Normalization* group on the left-hand side of the Results tab.
- Click the *Ratio-based* button at the top of the dialog box.
- From the *mean of the* list box, select a ratio type. Typically, this is the main ratio value that you use for all your analyses.
- Select *the normalization features* from the second list box.

- In the *is equal to* field, enter a ratio value. The value here depends on the expected behavior of your control features. For example, if you expect your control features to have a ratio of 0.8, enter 0.8.

To configure normalization so that you normalize with user-defined normalization factors:

- Click the *Configure* button in the *Normalization* group on the left-hand side of the Results tab.
- Click the *User-defined* button in the middle of the dialog box.
- Enter your own normalization factor for each image.

With normalization configured, all that remains is to apply it to your Results and images. You can do this by:

- Clicking *Normalize* within the *Configure* tab OR
- Clicking *OK* to exit from the *Configure* tab (this accepts your normalization configuration but does not apply it) and then click the *Apply* button in the *Normalization* group on the left-hand side of the Results tab.

To remove normalization once it has been applied:

- Click the *Remove* button in the *Normalization* group on the left-hand side of the Results tab.

If you normalize your Results and then save, your normalized Results are saved. If you intend to do further analyses on your Results in GenePix Pro (for example, removing normalization and trying out different normalization methods), we recommend that you save your Results unnormalized.

After Normalization, the status bar at the bottom of the GenePix Pro main window reads “(Un)Linked – Normalized”.

Defining Your Own Flagging Criteria

The *Flag Features* dialog box is an extremely powerful tool for flagging features by constructing general Boolean queries of Results tab data. You can type or insert

VBScript expressions in the *Query* field and have them evaluated in the Results table. You can also save commonly used queries, such as custom quality control or normalization conditions that you apply to every array.

(Note: In GenePix Pro 6.0, the Good flag value and the Bad flag value when applied from the *Flag Features* dialog box are different to the flag values when they are applied manually: Good is 99 and Bad is -99.)

A query typically consists of several conditions joined with the logical connectives AND or OR. A row satisfies a query consisting of two conditions joined by an AND if it satisfies both conditions independently; it satisfies a query consisting of two conditions joined by an OR if it satisfies at least one condition.

To construct a single condition, such as:

$$[\text{Ratio of Medians (635/532)}] > 1.5$$

- Click the *Flag Features* button in the *Normalization* group on the left-hand side of the Results tab.
- To begin a new query, click the *New* button on the right-hand side of the dialog box.
- From the *Column* list, select “Ratio of Medians (635/532)”.
- From the *Operator* list, select “>”.
- In the *Value* field, type “1.5”.
- Click the *Add* button to add the condition to the current query in the *Query* field.
- Click *Evaluate* to find the number of rows to which the condition applies.
- Click the *Save As* button to save the query.

You can build this expression into a more complex query. For example, to add the following condition:

$$[\text{Ratio of Medians (635/532)}] < 0.66$$

- Click the *Or* button.

- From the *Column* list, select “Ratio of Medians (635/532)”.
- From the *Operator* list, select “<”.
- In the *Value* field, type “0.66”.
- Click the *Add* button to add the condition to the current query in the *Query* field.
- Click *Evaluate* to find the number of rows to which the condition applies.
- Click the *Save* button to save the query.

The full expression now looks like:

```
[Ratio of Medians (635/532)] > 1.5 OR
[Ratio of Medians (635/532)] < 0.66
```

Features are flagged on exiting the dialog box by clicking the *OK* button. You can also choose to highlight the rows in the Results tab.

To flag features in the Results tab which satisfy the query:

- Check the *Flag* check box in the *Action* group at the bottom of the dialog box.
- Select the type of flag to apply.
- Click *OK*.

To highlight rows in the Results tab which satisfy the query:

- Check the *Highlight Data* check box in the *Action* group at the bottom of the dialog box.
- Select whether to *Replace* the current highlighted rows, or to *Add* to the current highlighted rows.
- Click *OK*.

Using Flag Features for Complex Quality Control Queries

You can use the *Flag Features* dialog box to construct arbitrarily complex quality control conditions on your features.

First, you need to decide on a set of quality control criteria. For example, you might choose to exclude (*i.e.*, flag *Bad*) any feature that satisfies the following criteria:

- the feature intensity is near background;
- the feature is not uniform;
- the background is not uniform.

You need to be able to translate these conditions into symbolic expressions. The first is relatively simple. It can be expressed as:

$$[\% > B635+2SD] < 70 \text{ OR } [\% > B532+2SD] < 70$$

This condition picks up features that do not have at least 70% of their feature pixels more than two standard deviations above background in either the green or the red channel. You may want to experiment with the figure of 70% to find a figure that is diagnostic for your arrays.

The second condition is a little trickier. One way of measuring the non-uniformity of the feature is to compare any of the five ratio types reported by GenePix Pro, *e.g.*, the ratio of medians and the regression ratio. It can be expressed as:

$$[\text{Ratio of Medians (635/532)}] > (1.2 * [\text{Rgn Ratio (635/532)}]) \text{ OR} \\ [\text{Ratio of Medians (635/532)}] < (0.8 * [\text{Rgn Ratio (635/532)}])$$

This condition picks up features that have a ratio of medians greater than 1.2 or less than 0.8 times the regression ratio. Again, you may want to experiment with these values of 1.2 and 0.8.

Finally, to select features with a variable background, compare the mean and the median background levels:

$$([B635 \text{ Mean}] > (1.2 * [B635 \text{ Median}])) \text{ OR} \\ ([B532 \text{ Mean}] > (1.2 * [B532 \text{ Median}])) \text{ AND} \\ ([B635 \text{ Median}] > 40 \text{ OR } [B532 \text{ Median}] > 40)$$

This condition selects features that have a mean background greater than 1.2 times the median background at either wavelength. It also includes a lower bound on the

absolute value of the background, as variation in a very low background level is not as significant as variation when the background is higher. The condition picks out features that have bright pixels or smears in their backgrounds, or features with irregular shapes that do not fit the circular feature-indicators.

Because a feature that fails any of these criteria is deemed to have failed overall, join each of the conditions by an OR to construct a single query:

```
[% > B635+2SD] < 70 OR [% > B532+2SD] < 70 OR
[Ratio of Medians (635/532)] > (1.2*[Rgn Ratio (635/532)]) OR
[Ratio of Medians (635/532)] < (0.8*[Rgn Ratio (635/532)]) OR
(( [B635 Mean] > (1.2*[B635 Median]) OR
[B532 Mean] > (1.2*[B532 Median])) AND
([B635 Median] > 40 OR [B532 Median] > 40))
```

You can continue to add conditions to this query. For example, you may want to add checks for absolute feature intensity (*i.e.*, features are flagged *Bad* if the Sum of Medians is not above a certain intensity) or absolute background intensity (*i.e.*, features are flagged *Bad* if their backgrounds are above a certain intensity).

Consult the “Flag Features” topic in the on-line Help for more information about using this dialog box.

Saving and Exporting the Data

Once the analysis has been completed, you should save your data.

To save in the default GenePix Results (GPR) file format:

- Click the *File...* button on the right-hand side of the GenePix Pro main window.
- Select *Save Results As*.
- Enter a file name.
- From the group of *Naming* options, check the boxes to add prefixes and suffixes to the name.

- Click *OK*.

To ensure consistency among data to be stored in a database, data saved in the GPR format always contain the full set of columns, regardless of the current column display, or the color mode.

To export only the current view of the Results, *i.e.*, the columns in your customized view:

- Click the *File...* button on the right-hand side of the GenePix Pro main window.
- Select *Export Results*.
- Enter a file name.
- From the group of *Naming* options, check the boxes to add prefixes and suffixes to the name.
- Click *OK*.

Note that exported Results are saved as plain text files (*.txt) and cannot be opened in GenePix Pro.

To export only selected rows from the Results tab:

- Select the rows that you want to export. Select contiguous groups of rows by holding down the <Shift> key when selecting; select discontinuous rows by holding down the <Ctrl> key when selecting. To select all rows, use the <Ctrl+A> Hot Key.
- Press the *Copy* button on the right-hand side of the GenePix Pro main window, or use the <Ctrl+C> Hot Key.

If the buttons for exporting the data are disabled, this is because you currently do not have a GenePix Pro security key attached to your computer.

Scatter Plot

Use the Scatter Plot tab to generate scatter plots of any two analysis data types for all spots on the array, or to draw a histogram of any one analysis data type.

To choose quantities plotted on each axis:

- Do an analysis or open a Results file.
- Switch to the Scatter Plot tab.
- From the *X Axis* group on the left-hand side of the Scatter Plot tab, choose a quantity to plot along the X Axis, *e.g.*, Sum of Medians.
- From the *Y Axis* group on the left-hand side of the Scatter Plot tab, choose a quantity to plot along the Y Axis, *e.g.*, Log Ratio.
- You can also specify the Scatter Plot axes directly from the Results tab by right-clicking on any column and choosing *Set this data type as Scatter Plot X- (or Y-) axis*.

Position the mouse over any point on the Scatter Plot to display the associated feature in the Feature Viewer.

The Scatter Plot and the Results spreadsheet are fully integrated: select several features in one tab and when you switch to the other tab they are highlighted. If images and Results are linked (see above Section “Linkage”), then selecting or highlighting features on the Scatter Plot tab selects or highlights them on all tabs.

Some useful ways to display data:

- F1 Median vs. F2 Median: the diagonal through the origin separates features with a higher activity than the reference from features with a lower activity than the reference. If the data cloud lies significantly off the 45-degree diagonal, it may indicate a significant difference in channel intensity that should be normalized.
- Index vs. Log Ratio: the chosen ratio is displayed as greater or less than 1.0 for all spots. Differentially regulated features are more easily identified than on a standard intensity comparison plot.
- Sum of Medians (Log Axis) vs. Log Ratio: highlights low intensity spots with artificially high ratios. If the denominator of a ratio is very low, the resulting ratio value may be artificially high. You can use this plot to identify such false outliers.

To flag features on the Scatter Plot:

- Click and drag the cursor to select a group of data points.
- From the right mouse menu, or from the *Feature* menu on the right-hand side of the GenePix Pro main window, select a Flag command.

To show or hide flagged features:

- Click the *Display* button in the *Display* group on the left-hand side of the Scatter Plot.
- Check the types of flagged features to display.

To show or hide analysis lines (regression line, *k*-standard error lines):

- Check the *Analysis Lines* box

To configure analysis lines:

- Click the *Configure...* button in the *Display* group on the left-hand side of the Scatter Plot.
- Check which lines to display from: Regression Line; *k*-standard deviation lines.

To draw a histogram:

- Select *Histogram* from the *Visualization* list on the Scatter Plot tab.
- Select a data type from the *X Axis* list.

Report Tab and Scripting

The Report tab is an embedded Internet Explorer window, so it has all the scripting functionality of that program: scripts can be written in VBScript, JavaScript, or any other scripting language supported by Internet Explorer (such as PerlScript or Python).

The Report tab includes ready-to-use Reports for scanner performance validation and analysis. It enables full scripting of all GenePix Pro acquisition and analysis functions. To demonstrate some of the functionality and power of the GenePix Pro

Report tab, several example Reports are installed with the program. These are always available from the Report tab by clicking the *Home* button.

To use any of the Reports:

- Switch to the Report tab.
- Click the Report that you want to run and follow its instructions.

The Analysis Reports are ready to use for advanced data analysis. The Hardware Diagnostic Reports include tools for GenePix scanner performance validation. The Example Reports demonstrate how to use some properties and methods of the GenePix Pro Object Model. Any of these can be customized directly in GenePix Pro by clicking the *Edit* button on the left-hand side of the Report tab.

The GenePix Pro on-line Help (press <F1>) includes an extensive scripting tutorial in which the GenePix Pro Object Model is documented.

Special Functions

The following is a description of other features of GenePix Pro that you may use regularly.

Measuring Tools

When you want to measure pixel values in an arbitrary line or area on an image, use the Measuring Tools provided in GenePix Pro. With these tools, you can create your own data measurement regions, including line profiles, multiple line-segment profiles, rectangular averaged lines, and rectangular, elliptical and polygonal areas.

To use the Measuring Tools:

- Click the *Measuring Tools* button from the *Tools* group on the left-hand side of the Image tab.
- Select the tool you want from the popup menu.
- Using the mouse pointer as a drawing tool, create a measuring region on the image.



The use of each tool is fully explained in the on-line Help. You can create multiple measuring regions on one image, and move and resize them like blocks and features.

The information about the selected region is automatically displayed in the *Measuring Tools Properties* window, including a graph of pixel intensity data for each wavelength.

To hide or show the *Measuring Tools Properties* window:

- Click the *View Measuring Tools* button from the *Tools* group on the left-hand side of the Image tab:



Pixel Plot

Use the Pixel Plot to evaluate individual features in more detail.

To view the Pixel Plot:

- Go to the Image tab.
- Open an image and place blocks on the image.
- Position the mouse over a feature-indicator.
- Press the <P> Hot Key, or in Feature mode select *Pixel Plot* from the right-mouse menu, or from the *Feature* menu on the right-hand side of the GenePix Pro main window.

The Pixel Plot graphs the distribution of the pixels within the selected feature-indicator.

To see the distribution of feature pixels and background pixels for the feature:

- In the *Items to Plot* group, check the *Feature Pixels* and *Background Pixels* check boxes, and uncheck the *Regression Pixels* check box.
- The pixels are plotted as points on the graph, with background pixels black and feature pixels yellow.

To see the difference between the Ratio of Medians and the Regression ratio for the feature:

- In the *Items to Plot* group, check the *Ratio of Medians* and *Regression Ratio* check boxes, and uncheck the *Median of Ratios* check box.
- The ratios are plotted as lines through the points, with the Ratio of Medians red and the Regression Ratio blue.

The Pixel Plot also shows derived ratio measurements, so you can see the relationship between ratio and pixel values. The derivation of all ratio measurements is discussed in further detail in Chapter 3.

Histogram

The Histogram displays the distribution of pixels for each raw wavelength image. The display color-codes each distribution according to the ratio colors used to create the ratio image; *i.e.*, if the first channel is displayed in red on the Image tab, its trace on the Histogram is drawn in red.

The Histogram is derived from the current view of the image in the Image tab, so if you have zoomed in on part of an image, only those pixels currently displayed are used to construct the Histogram.

To see the Histogram for the entire image:

- Go to the Image tab.
- If you are zoomed in to a part of the image, press *Zoom Full Scale* to see the whole image.
- Select *Zoom mode* from the *Tools* group on the left-hand side of the Image tab.
- Draw a zoom area tightly around the features on the image to exclude as much background as possible.
- Switch to the Histogram tab.

To use the Histogram to see how many pixels are saturating:

- Press *Full Scale* in the X Axis group on the left-hand side of the Histogram tab.

- Zoom in on the far right edge of the histogram, by holding down the mouse cursor and dragging it along the X axis between 60000 and 65000.
- The proportion of saturated pixels is plotted at 65535.

The Histogram is also useful for checking the balance of the PMT settings for each of the lasers. For example, if the peak of the red trace is significantly shifted to the right of the peak of the green trace, this suggests that you may need to increase the PMT settings for the green channel (see above Section “Optimizing Hardware Settings”), or normalize your Results (see above Section “Normalization”).

Batch Analysis Tab

Use the Batch Analysis tab to do spot finding and analysis on batches of images.

1. Select images and GAL/GPS files to process

The first step in setting up a Batch Analysis is to select the images to process.

Adding files to the list

Click the *Add* button to select images and a GAL or GPS file for the batch. You can use a single GAL/GPS file for the whole batch, or different files:

- To use a single GAL/GPS file, select a batch of images and only one GAL/GPS file in the Add dialog.
- To use different GAL/GPS files for different images, select the images with the Add command, and then select each image in turn from the Batch Analysis list, and use Select GAL or Select GPS to apply a GAL/GPS to that file only.

When a GAL/GPS file is selected, it is listed in the "Initial GAL or GPS" column.

File names of generated files

When images are added to the Batch Analysis list, the GPS and GPR file names of the files that will be generated from the Batch Analysis are listed in the "Aligned Settings (GPS)" and "Results (GPR)" columns.

Note: Batch Analysis never overwrites existing GPS or GPR files: generated file names are always unique in the directory in which they are saved.

Generated files location

GPS and GPR files generated by Batch Analysis are by default saved in the same directory as the images.

However, you can also specify a different directory. To do this, select **Use folder options** and then configure the directory using *Options / Folders*.

Single-image TIFF files

If you have pairs of single-image TIFF files, then you need specify how they are to be paired, typically by a file name suffix. GenePix Pro recognizes a number of common file name suffixes (*e.g.*, "_635" and "_532") or you can add your own in *Options / Batch Analysis*.

2. Align and Analyze

You can align features in a batch in one of two different ways, depending on how you want to review the results:

- Align one image at a time, and review the results at the end of each image alignment: use *Process Next*.
- Align all images, then review all images: use *Align All*.

When the alignment is finished, whether it is one array or a whole batch, use the Batch Review dialog box to review the results:

- If you are aligning one image at a time, you can inspect the generated settings on the Image tab, edit them as required, save settings, and then click the *Align Next* button.
- If you have aligned a whole batch, you can step through each image in the batch by clicking the *Open Next* button.

Find Array (Recommended)

From the Batch Analysis tab, alignment is always Find Array, Find All Blocks, Align Features <F8>.

The only known case in which <F8> may possibly fail is when an image has a bright barcode in which the dimmest part of the barcode (generally the bars) is brighter than the brightest part of the image. In such a case, the Find Array algorithm may find the barcode instead of the features on the image. In such a case you should skip the Find Array part of the algorithm. For the rest of the spot finding to proceed successfully, the starting position of the blocks should overlap the blocks on the image.

Analyze

Select the Analyze option to analyze images and generate GPR files after the spot finding has finished.

Run this flag features query

After each GPR file is generated you can run a saved *Flag Features* query, to perform some primary quality control flagging on the generated GPR file.

Workflow Automation Options

GenePix Pro 6.0 includes several options designed to automate routine tasks. The most obvious of these is the *Preview Scan then Data Scan* button. If you are content to scan a whole slide, or if you are confident about the placing of your scan area, you can press this button and perform the two scans consecutively.



To set other Workflow options:

- Click on the *Options* button on the right-hand side of the GenePix Pro main window.
- Click the *Workflow* tab.
- In the *Automatically* group, check any of the options that you want to use to automate acquisition or analysis.

To configure GenePix Pro so that each user has a user name with which they log in to GenePix Pro:

- Click on the *Options* button on the right-hand side of the GenePix Pro main window.
- Click the *Workflow* tab.
- Check the *User Identification* check box.

All GenePix Pro settings are saved on a per-user basis.

Workflow options are useful on their own, but become particularly powerful when used together with scripting in the Report tab.

Find

Use the *Find* command to find substance names and/or IDs anywhere in GenePix Pro.

To search for substance names or IDs in the Image tab:

- Switch to the Image tab.
- Click the *Find* button on the right-hand side of the GenePix Pro main window.
- Check the *Feature Names* and *Feature IDs* check boxes.
- Enter the Name or ID to search for in the *Containing Text* field.
- Check the boxes next to any other options that you might require, such as *Exact match* or *Case sensitive*.
- Click *OK*.



In the Image tab, *Find* highlights features that have the name or ID specified and snaps the cursor to the feature. In the Lab Book tab you can search for any keyword whatsoever. In the Results and Scatter Plot tabs, *Find* highlights features that match the search criteria.

Lab Book

The Lab Book is a document that logs all file events that occur while GenePix Pro 6.0 is running. For example, the Lab Book automatically records whenever an image file, a settings file, or an array list file is opened or saved. It is also a simple database: double-clicking on an entry such as a settings or an image file opens it into GenePix Pro.

Logged information from all image acquisition and analysis sessions can go to the same file, or alternatively, each session or experiment can have its own Lab Book. This allows you to keep track of your files during the course of a series of experiments.

Like the Results spreadsheet, the columns in the Lab Book can be re-ordered by dragging and dropping their heading tabs.

The Lab Book is saved as a binary file with a *.gpl extension, and its contents can be copied to the Windows Clipboard. The Lab Book is automatically saved each time a new entry is made.

Calibrate System

The GenePix Pro system calibration procedure matches your scanner's response to benchmark performance levels established at the factory. In an ideal scanner. Given the same scanner settings (*i.e.*, PMT Gain and Laser Power if available), any calibrated scanners produce the same output from the same samples. System calibration corrects for variations among scanners, and for slow variations that are inherent to all lasers and PMTs over the lifetime of the components. GenePix Pro logs scanner performance in the Hardware Diagnostics Report every two hours during operation.

The calibration procedure produces calibration constants that are used to adjust the voltage across each PMT. For a calibration constant of 1.0, the range of the gain is 100 to 1000. Because calibration constants differ among scanners, the range of PMT Gain in the *Hardware Settings* dialog box may differ slightly among scanners (as this is an absolute scale). The range may also change over a scanner's lifetime as the calibration constant changes.

To calibrate your scanner:

- Click the *Hardware Diagnostics* button on the right-hand side of the GenePix Pro main window.
- Click the *Calibrate System* button.
- Check both the laser check boxes to calibrate both wavelengths.
- Click the *Start* button, and the wizard guides you through the rest of the procedure.

To match the signal output from multiple scanners:

- Repeat the process above using the same calibration standard for all scanners.
- After calibration, setting each scanner to the same PMT gain will produce the same signal output from a given sample.

Using Two Scanners

You can connect to two different scanners from two different computers, or from the same computer.

To connect to two scanners from the same computer (not at the same time):

- Create a GenePix Pro shortcut for each scanner (in the *Axon Laboratory* group of your Windows Start menu, or on the Windows desktop). If your GenePix Pro software is installed in C:\Axon\GenePixPro4, then the two shortcuts would have the following targets:

C:\Axon\GenePixPro4 /Device1

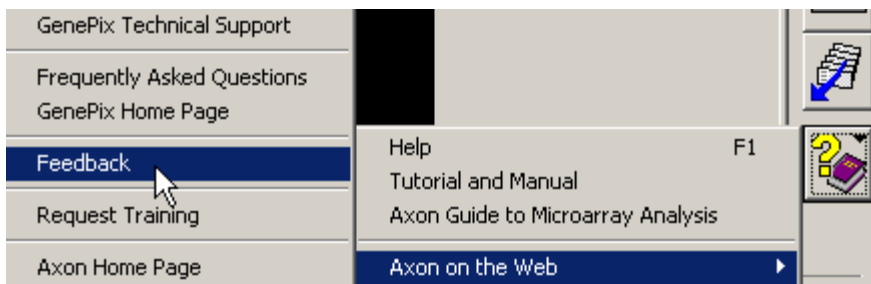
C:\Axon\GenePixPro4 /Device2

The identities of devices one and two depend on their SCSI order. Double-clicking on the Device1 shortcut attaches the software to scanner 1, while double-clicking on the Device2 shortcut attaches the software to scanner 2.

Feedback

Axon Instruments / Molecular Devices welcomes feedback on all its products. There is a Web page devoted exclusively to comments and suggestions on how to

improve GenePix Pro. If your computer is networked, press the Feedback button to open a page on the Axon Instruments / Molecular Devices web site, from where you can send a message to Molecular Devices, or ask a question about GenePix Pro.



Summary

This is the end of the tutorial. We hope that you enjoy using GenePix Pro 6.0. Axon Instruments / Molecular Devices has put every effort into designing and constructing an application that will work with you to get your array tasks done efficiently.

Remember to refer to the on-line Help and the rest of the User's Guide if you have any further questions about using GenePix Pro. If you encounter a problem that you can't solve, don't hesitate to contact Technical Support.

Appendix A

Installing A Network Key

Network License Key and NetHASP License Manager

A *network hardware protection key* is a single device that provides security authorization for multiple-site license software, avoiding the inconvenience of having to install individual keys for each computer on the network. After attaching the actual physical network key to one computer on the network, you also need to install the NetHASP License Manager and device drivers on the same computer. This computer is then referred to as the *NetHASP server*. The NetHASP License Manager and HASP Monitor software provide centralized control and reporting of license and user information within the network.

This Appendix has instructions for how to install the key and the License Manager and Monitor software. If your multi-site license Axon software came with a bundled computer, then that computer will already have been configured as the NetHASP server. If you wish to use another computer as the NetHASP server, simply uninstall the License Manager from the current server, then follow the installation procedure on the next page.

Installing the Network Key

If you have purchased a multi-site license for your Axon software, you will be provided with a network key that you need to install to access the full functionality of the software. The network key is a small USB device that can be attached to any computer on the network that has a free USB port, with the following conditions:

- The chosen machine must support USB: for instance, the Windows NT operating system *does not support* USB devices, and so *you cannot install the network key on a computer running Windows NT*. Dual-boot machines are not recommended.
- The chosen computer should ideally be one that is always switched on and rarely rebooted, for example: a Mail, Print or other software server.

Like any USB device, the network key may be ‘piggybacked’; in particular, if you use two or more Axon software products on your network, each with its own multi-site license and network key, you can install all the network keys on the same computer. This is convenient for centralized management of license and user information.

To install the network key, simply attach it to a free USB port on the chosen computer.

Installing NetHASP License Manager (Windows 2000 & Windows XP)

After attaching the network key, you need to install the NetHASP License Manager and NetHASP device drivers on the same computer.

A copy of the NetHASP License Manager software is provided with the installation CD-ROM for your Axon software. To install NetHASP License Manager and device drivers:

- Close all programs and restart your computer.
- Insert the installation CD-ROM into your computer’s CD drive.

- Open the My Computer icon on the desktop to display a list of your computer's drives, and double-click the icon corresponding to the CD drive (frequently E:).
- Open the Network Key folder, and double-click lmsetup.exe to start the install process.
- The InstallShield program will ask whether you want to install the NetHASP software, and then prompt you to close any active NetHASP License Manager processes before continuing—select Yes in both dialogs.
- The installer then reports previous installation and version information—select Next.
- The installer then prompts for what type of installation you want: Typical, Service, or Custom—select Service, then Next.
- You are now prompted for the name of the directory to which the NetHASP License Manager software will be installed; you can choose a location yourself, or leave the destination default (C:\Program Files\Aladdin\NetHASP LM). Select Next.
- Select Yes in the dialog that appears confirming the creation of the destination directory.
- The installer then prompts for the name of the Program Folder in which the NetHASP icons will be created—you can choose a new folder yourself, or leave the folder name default (NetHASP License Manager). Select Next.
- The installer then displays the current installation configuration, and you are prompted to confirm or change as desired. If the settings are correct, select Next, otherwise step Back to change the details.
- Select OK in the dialog that appears reporting that the NetHASP License Manager has been installed successfully.
- The installer then automatically proceeds to install the NetHASP Device Driver—select Yes to continue.

- Select OK in the dialog that appears reporting that the driver was installed successfully.
- You are then prompted to start the installed NetHASP License Manager service—select Yes.
- Select OK in the dialog that appears reporting that NetHASP License Manager was started successfully.
- Select Finish to exit from the install program.

The NetHASP License Manager and NetHASP device drivers are now installed, and the License Manager service is running.

Installing HASP Monitor Program (Windows 2000 & Windows XP)

After installing the network key, the License Manager and drivers, you may want to install the Aladdin HASP Monitor software on the NetHASP server. The HASP Monitor is used to track and report usage information for the licenses operating on the network.

A copy of the Aladdin HASP Monitor software is provided with the installation CD-ROM for your Axon software. To install Monitor:

- Close all programs.
- Insert the installation CD-ROM into your computer's CD drive.
- Open the My Computer icon on the desktop to display a list of your computer's drives, and double-click the icon corresponding to the CD drive (frequently E:).
- Navigate to the \Hasp Monitor\install\ directory, and double-click the aksmon32 icon to start the install process.
- The install program starts, and prompts you to exit all Windows programs—select Next to continue.

- You are now prompted for the name of the directory to which the Monitor software will be installed; you can choose a location yourself, or leave the destination default (C:\Program Files\Aladdin\Monitor). Select Next.
- The installer then asks whether you want to create backup copies of files that are replaced by the installation process, and prompts for a backup file destination directory. Select the Yes button (enable backup creation), choose a destination, then select Next.
- The installer then prompts you to either continue with the current installation setup (select Next), or step Back to change the current configuration.
- The installer should report that the Monitor software has been successfully installed—select Finish to exit from the install program.

The Aladdin HASP Monitor software is now installed. Now when GenePix Pro is installed on any computer on the network, it will automatically recognize the network license.

Technical Assistance

If you need help to resolve a problem, there are several ways to contact Axon Instruments / Molecular Devices:

World Wide Web

www.axon.com

Phone

1 (800) 635-5577

Fax

+1 (510) 675-6300

E-mail

axontech@axon.com

Questions?

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Glossary

Array List

An array list is a file (*.gal) that contains block and substance information for the array, which is supplied by the slide manufacturer. Create array lists from plain text files with the Array List Generator. The *Load Array List* command creates an array of blocks with dimensions based on the Array List, and with each feature-indicator named according to the substance names in the Array List. These names are then used in the various Feature Viewers, the Pixel Plot dialog box and the Results tab.

Block

A collection of feature-indicators drawn on an image in GenePix Pro. The collection of all blocks on a slide is called an *array*, and a subset of identical groups of blocks is called a *subarray*.

Boolean Query

A Boolean Query in GenePix Pro is a statement in the *Flag Features* dialog box expressed in Boolean logic, *i.e.*, atomic sentences connected by the operators AND, OR and NOT.

Feature

A feature is a spot on an array. The collection of such features is called an *array*. GenePix Pro assigns feature-indicators to features in order to analyze each feature separately.

Feature-indicator

A feature-indicator is a circular region defined on an image within which GenePix Pro calculates the pixel intensity and feature intensity of a feature on the array.

A portion of the image outside the feature-indicator is used to calculate the feature background intensity.

Feature Background Intensity

The feature background intensity of a feature at a wavelength is the median intensity of the set of background pixels defined for that feature. The background pixels include all of the pixels within a circular region that surround the feature of interest. The circular region has a diameter of three times the diameter of the current feature-indicator. All pixels that are contained within a neighboring feature-indicator, or the feature-indicator of interest, are excluded. Using the median, rather than the mean, of background pixel intensities significantly reduces the effect of spurious pixels significantly contributing to the background.

Feature Intensity

The feature intensity is defined as the median or mean of all of the pixel intensities in a given feature-indicator.

Feature Pixel

A feature pixel is a pixel that falls within (in a technically well-defined sense) a feature-indicator. Pixel intensities of feature pixels at different wavelengths are used to calculate various derived quantities, such as feature intensities.

Flag

Added to a feature-indicator to highlight some feature. In Feature mode, you can Flag features as 'Good' or 'Bad'. Features flagged 'Good' are marked with a circle, and features flagged 'Bad' are marked with a cross. Features used to calculate the normalization factor are marked with a square. Flags are exported to

the Results window. When exporting GenePix numerical data to spreadsheet programs like Microsoft Excel, Flags appear as '100' (good), '-100' (bad), '0' (not included in normalization), or '1' (included in normalization).

If a feature cannot be found during an *Auto Align Blocks*, it is flagged *Not Found* (numerically reported as -50). If an array list is missing a description of a particular feature, the feature is flagged *Absent* (numerically reported as -75).

Nudge

To move a single, or group, of feature-indicators within a block. Do this in Feature mode by selecting a feature-indicator and then moving it with the arrow keys.

Pixel Intensity

The raw intensity of a pixel on a GenePix Pro single-wavelength or ratio image, falling in a range from 0 to 65535. Pixel intensity (P) is reported in the Feature Viewer, and is one of the quantities exported to the Results window during an analysis.

Photomultiplier tube (PMT)

An optical device that detects photons and ultimately generates an electrical current that is proportional to the number of detected photons. The PMTs in the GenePix scanner are used to detect the photons that are emitted from the laser-excited fluorophores on the array.

Ratio Image

Any ratio image in GenePix Pro is an RGB (Red-Green-Blue) overlay image. Ratio images exported as JPEG or TIFF files are 24-bit RGB color.

Saturation

Saturation refers to the overloading of the photodetection circuitry. Saturation can be reduced by reducing the amount of light that is reaching the PMTs, which is done by reducing the amount of incident laser light. In practice, this is accomplished by reducing the gain of the PMT. Saturating pixels in GenePix Pro are shown as white pixels in the raw wavelength images.

Index

- Align Blocks, 58
- Analysis Array, 54
- Analysis Only Mode, 36
- Analyze, 65
- Array List, 8, 54, 66, 101
- Array List Generator, 12, 57, 101
- ATF, 31
- Autoscale Display Settings, 52

- Background Intensity, 25, 101
- Background Subtraction, 65
- Barcode Reading, 14
- Block, 8, 54, 101
 - Aligning, 8, 22
 - Creating, 54, 57
 - Quick Zooms, 60
 - Resizing, 60
 - Saving Position, 64
- Block Mode, 59

- Calibrate System, 85
- Coefficient of Determination, 25
- Color Mode, 47
- Cy3, Cy5, 16

- Data
 - Analyzing, 65
 - Exporting, 74
- Data Preview, 8

- Feature Viewer, 8, 102
 - Pixel Plot, 8, 23
- Data Scan, 14
- Data Types, 66
- Dongle, 3
- Dynamic Range, 40

- Feature, 8, 11, 54, 101
- Feature Intensity, 101
- Feature Mode, 61
- Feature Viewer, 8, 53, 102
- Feature-Indicator, 54, 101
 - Flagging, 62
 - Manipulating, 61
 - Moving, 61
 - Not Found, 22
 - Orange-Packing, 56
 - Resizing, 61
 - Spacing, 56
- File Formats, 31
 - ATF, 31
 - GAL, 31, 54, 57
 - GPL, 32, 85
 - GPR, 32
 - GPS, 32
 - GPS, 32, 44
 - JPG, 46, 102
 - TIF, 45, 102
- File Names, 46
- Filter Selection, 43

- Find, 84
- Flag, 27, 62, 101
- Flag Features, 70
- Focusing, 44
- Four-Color Mode, 48
- Full Scale, 52

- GAL, 12, 31, 54, 56, 57, 101
- GenePix Pro
 - Analysis Only mode, 36
 - Dongle, 3
- Glossary, 101
- GPL, 32, 85
- GPR, 32
- GPS, 32, 44
- Group Rows, 66

- Hardware
 - Focusing, 44
 - Signal-to-Noise, 42
- Hardware Settings, 40
- Histogram Tab, 80

- Image
 - Analysis, 47
 - Colors, 51
 - Compression, 33
 - Display, 14
 - Display During Scanning, 39

- Ratio, 39
- Register, 49
- RGB, 102
- Installation, 1
 - Computer Requirements, 1
- JPG, 32, 33, 46, 102
- Lab Book, 9, 32, 85
- Lasers
 - Adjusting Power, 43
- Line-Averaging, 42
- Linkage, 67
- Load Array List, 55
- Lock Settings, 64
- Mean, 17, 23, 24, 25, 26, 101
- Median, 17, 23, 24, 25, 26, 101
- Multiple Scanners, 86
- Multiple Users, 84
- Navigation Window, 52
- Normalization, 28, 69
- Nudge, 102
- On-Line Help, 36
- Open Settings, 44
- Photo-Multiplier Tube, 40, 102
 - Settings, 81
- Pixel Intensity, 102
- Pixel Plot, 8, 23, 79
- Pixel-by-Pixel Ratios, 23, 24, 25
- Preview Scan, 14
- Pseudocolor, 7
- Quality Factors, 26
- Ratio
 - Computation Of, 23
 - Display of, 102
 - Formulation, 50
 - Image, 39, 102
 - Log, 26
 - Pixel-by-Pixel, 23, 24, 25
- Register Images, 49
- Replicate Mode, 56
- Report Tab, 77, 84
- Results File, 32
- Results Tab, 32, 66, 76
- RGB Image, 15, 102
- Saturation, 40, 102
- Scan Area, 7
- Scatter Plot tab, 75
- Scatter Plot Tab, 8
- Scripting, 77
- Settings File, 32, 44
- Signal-to-Noise, 26, 42
- Software
 - Analysis Only mode, 36
 - Exporting Data, 74
 - File Saving, 45
- Flags, 27
- Hardware Settings, 40
- Histogram Tab, 80
- Image Display, 51
- Installation, 1
 - Lab Book Tab, 85
 - Results Tab, 66
- Spotted Substance, 16
- Standard Deviation, 20
- Subarray, 101
- Substance
 - Spotted, 16
 - Test, 16
- Technical Support, 9, 95
- Test Substance, 16
- TIF, 33, 45, 102
- Troubleshooting, 5
- User Identification, 84
- Using Two Scanners, 86
- Web Address, 58
- Web Integration, 8, 68
- Well Converter, 58
- Workflow, 83
- Zoom Area, 60
- Zoom Mode, 52
- Zoom Undo, 52