



Clinical Quick Start Setup for Progeny Administrator

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The quick start guide will allow administrative users to follow a check list of topics to begin with Progeny. Administrators can follow this path to configure Progeny for the first time. Each section contains a list of topics that are hyperlinks to instructional content. If information appears in [blue](#), it is a hyperlink to the topic within this document or to a newly updated knowledgebase case with step by step instructions and screenshots. Access the content by simply clicking on the link.

Administrator Checklist

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Database Creation

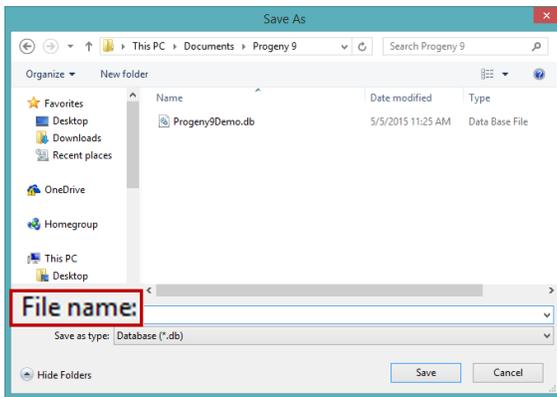
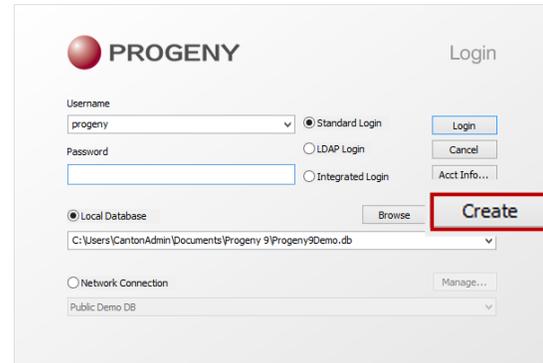
When the Progeny desktop client is installed, the demo database (Progeny9Demo.db) is installed to the Documents\Progeny 9 folder. This database contains basic fields and formatting for creating cancer- or cardiac related pedigrees. Modify this database as needed, use it as a template for creating other Progeny databases or merely draw inspiration from it to create a customized Progeny database completely “from scratch.”

Create a Progeny Database



← Launch the Progeny application.

On Login window, click Create →



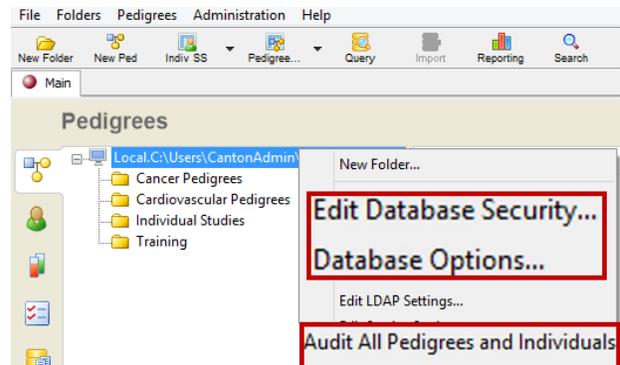
← Browse to the location in which the database is to be saved.

← In the File name field, enter a name for the database.

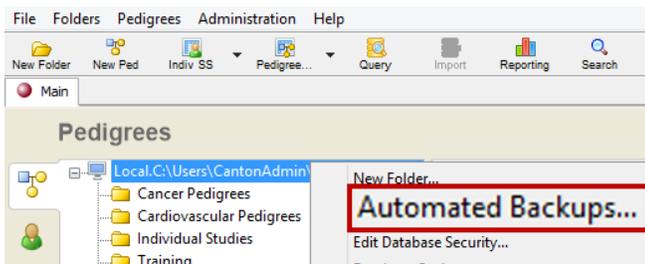
For more information see [Creating a Progeny Database](#).

Configure Core Database Options →

Click Pedigrees and right-click the folder root. Configure the following: Edit Database Security, Database Options and Audit All Pedigrees and Individuals. For more information see [Auditing Feature](#).



Initialize Automated Backups

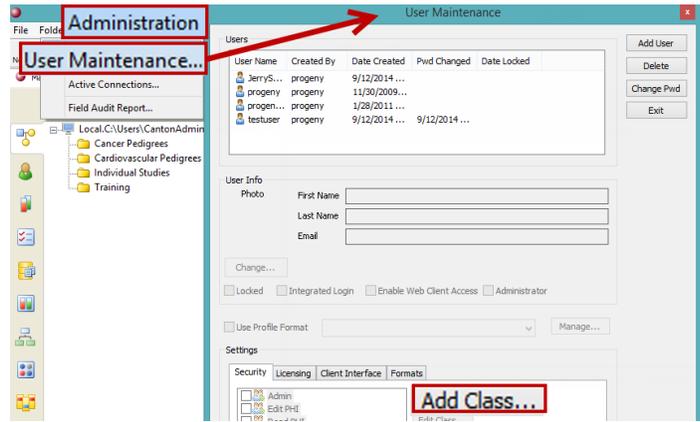


← Click Pedigrees and right-click the folder root. Select Automated Backups to configure.

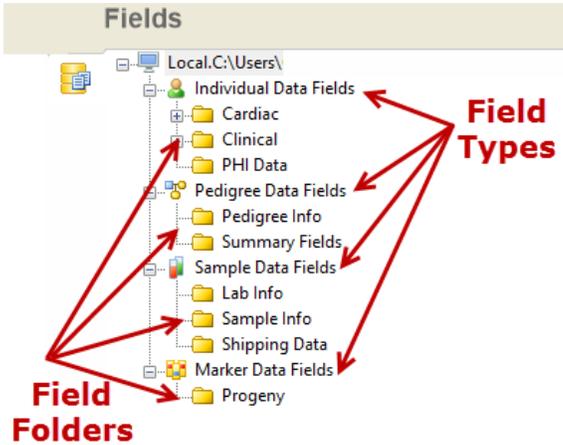
Define Database Structure

Add User Classes →

On the main menu select Administration and then User Maintenance. On the User Maintenance window select Add Class. For more information see [Add and Manage User Classes](#).

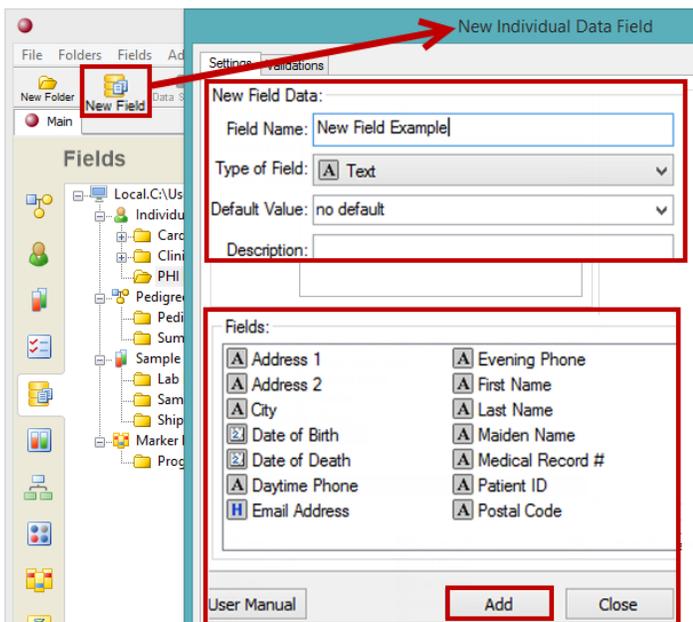
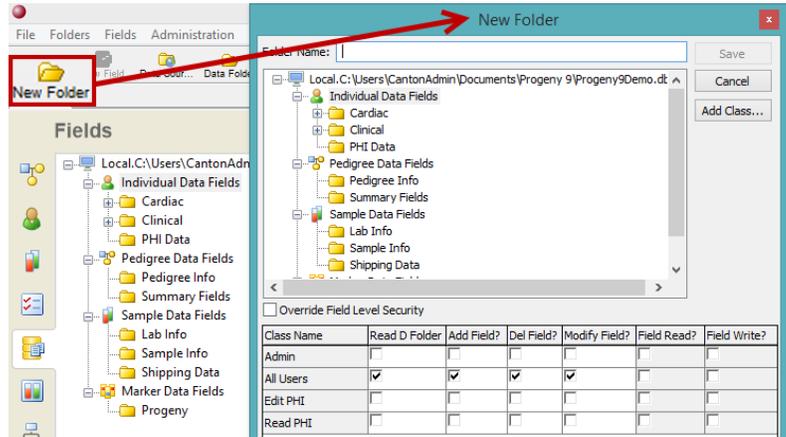


Create Field Folders and Fields



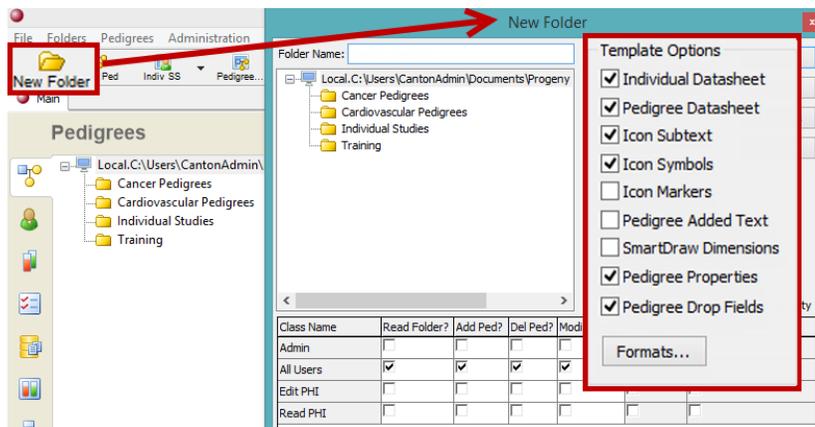
← Click the Fields window. There are four different types of record-level fields in Progeny: Individual, Pedigree, Sample, and Marker. Each field type has its own category specific folders in while users create and group fields.

To add a new folder, select New Folder. Input the folder information and select Save. →



← If the folder is not already selected, select the folder to add a new field and click New Field. The New Individual Data Field dialog box opens. Input the new field name and any necessary information. Select Add to create the new field. For more information on fields and field folders see [Database Design](#), [Database Security](#) and [System Fields](#).

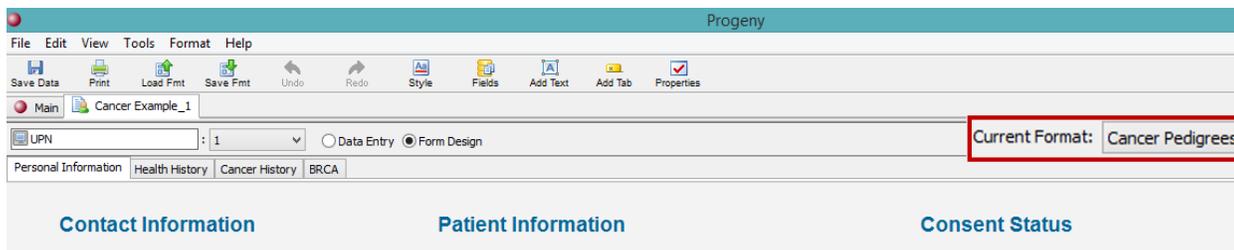
Create Pedigree Template Folders



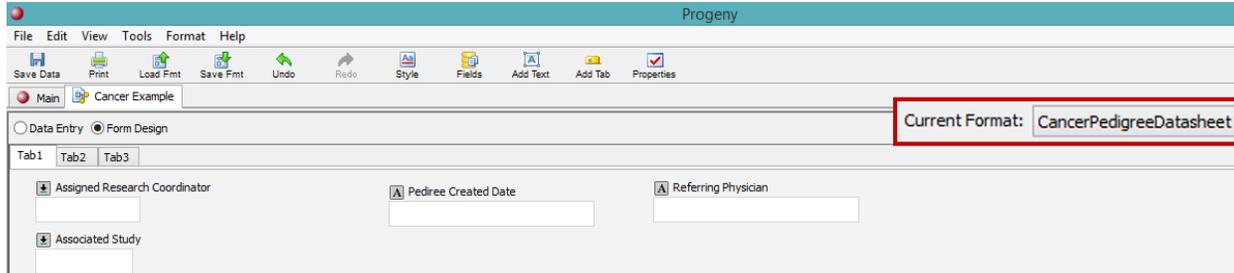
← On the Pedigrees window select New Folder and create a folder for each Pedigree study (i.e. cancer, cardiac, individual and training) and check the following boxes shown. Once formats (template options) are defined they can be applied to their template folder and all pedigrees and individuals within that folder will have the same formats.

Define Initial Formats:

1. Build individual datasheets for each template folder and save the formats with the corresponding topic:



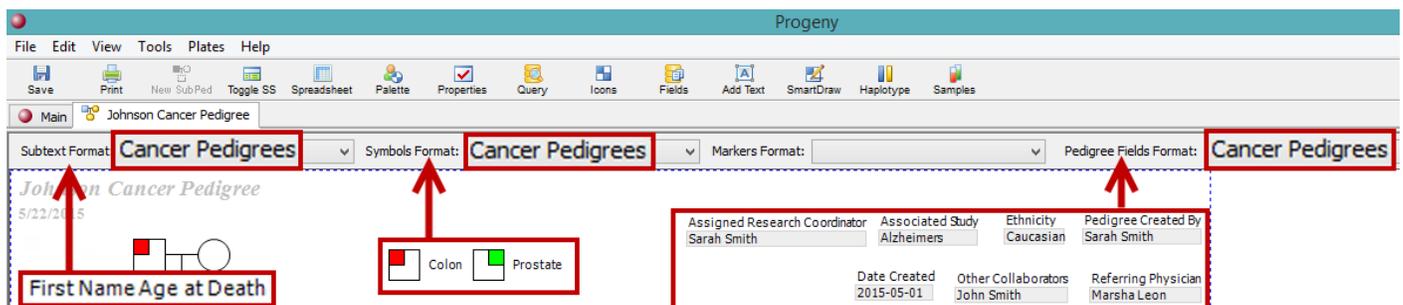
2. Build Pedigree datasheets for each template folder and save the formats with corresponding topic:



3. Configure Subtext

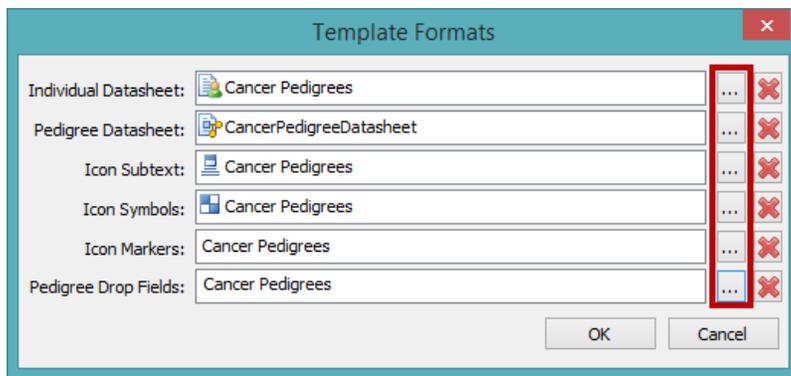
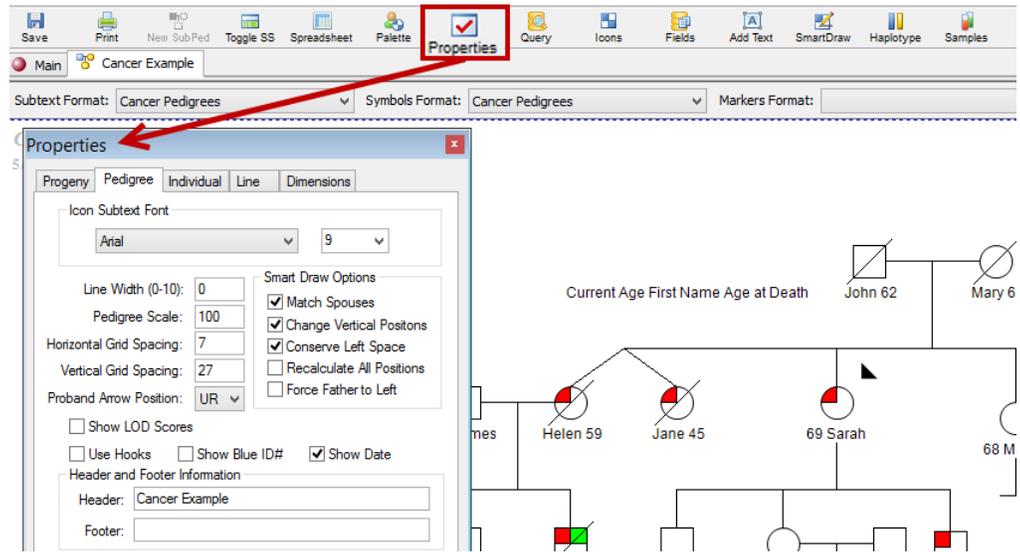
4. Configure Symbols

5. Configure Pedigree Fields for each template folder and save the formats with corresponding topic:



6. Configure the Pedigree Display Properties for each template folder. →

For more information see [Managing Data Folders](#), [Datasheet Basics](#) and [Template Options](#).



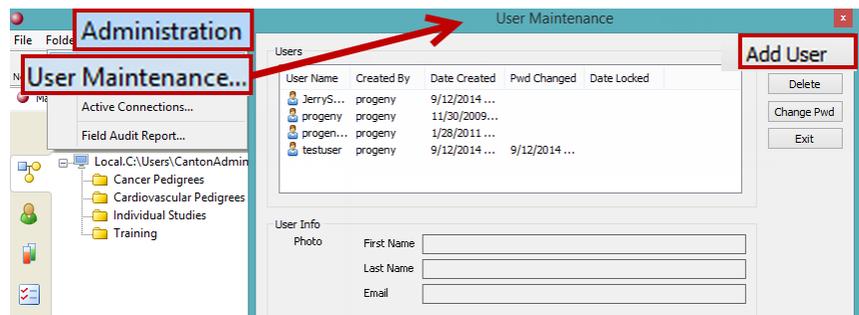
Apply Template Formats to Folder

Right click on the folder, select Edit Folder and click the Formats button.

← Use the ellipses button on each format to find the saved format and apply to individuals and pedigrees within the template folder and select OK.

Add User Accounts

On the main menu select Administration and then User Maintenance. On the User Maintenance window select Add User. →
For more information on users see [Add Users and Manage Users](#).



Database Deployment

Create Network Database Service

Double click SQL Anywhere 12 and then click the Services tab. Right click in the white pane and select New> Service.

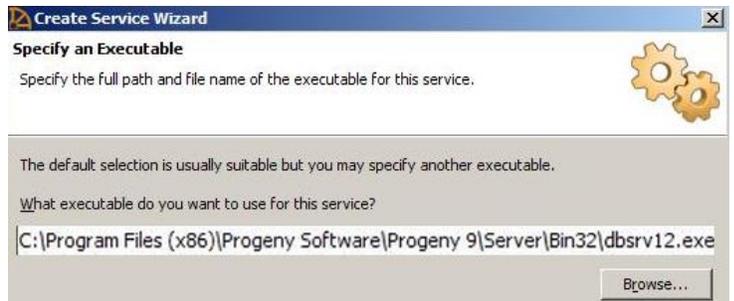


On the first screen, choose a name for the service which will be displayed within the Progeny 9 Server application. This name **MUST** begin with a letter and cannot contain any spaces or symbols. When the service name is chosen click Next>.



← Select Network Database Server and click Next>

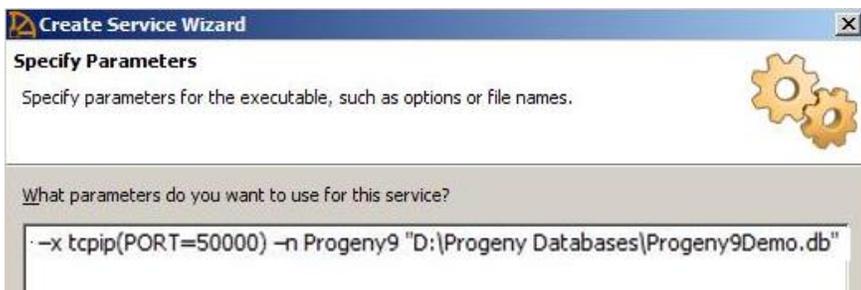
Keep the default and click Next> to continue →



Create a connection string that defines what database is being hosted, the port it is broadcast on and any miscellaneous optional configurations. The default connection string looks like the following:

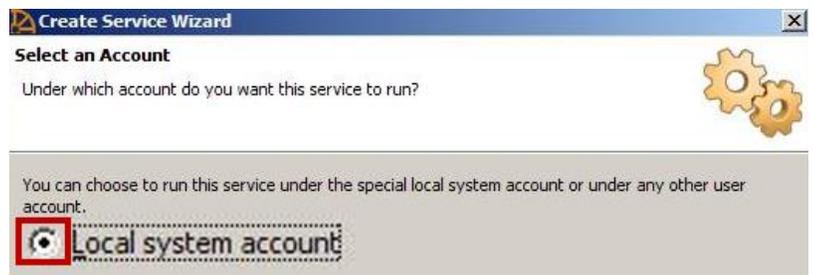
```
-x tcpip(PORT=####) -n $$$$ "%PATH%"
```

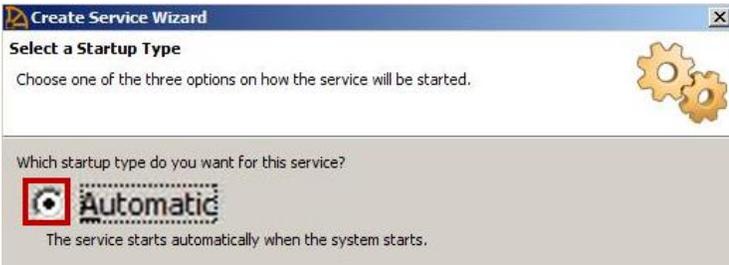
- #### = Server port dedicated to this specific database
- \$\$\$\$ = Broadcast name of database service (can be the same as the first screen)
- %PATH% = File path to the database file (make sure it includes .db extension and is encapsulated in quotation marks "...")



←After inputting the parameters click Next>

Under Select an Account, leave Progeny set to run under the Local System Account unless the organization's IT policies require otherwise. Click Next>. →



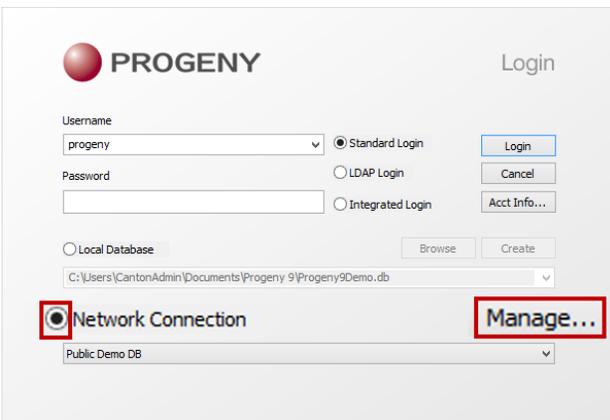


←The Startup Type on the following screen should always be set to Automatic during normal operation as this will start the service should the server be restarted without a prompt. Click Next>.

Finally, **DO NOT** select the checkbox on the Start the Service page – if mistakes were made during the service creation process this option will cause the application to hang for 5-10 minutes then crash. Click Finish. →

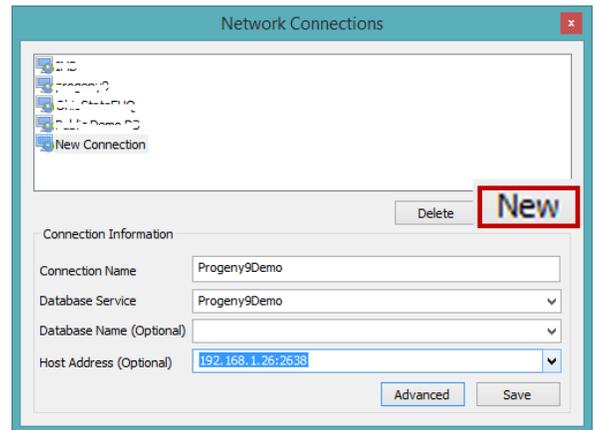


Create Desktop Client Network Connection



← Select the Network Connection and then Manage.

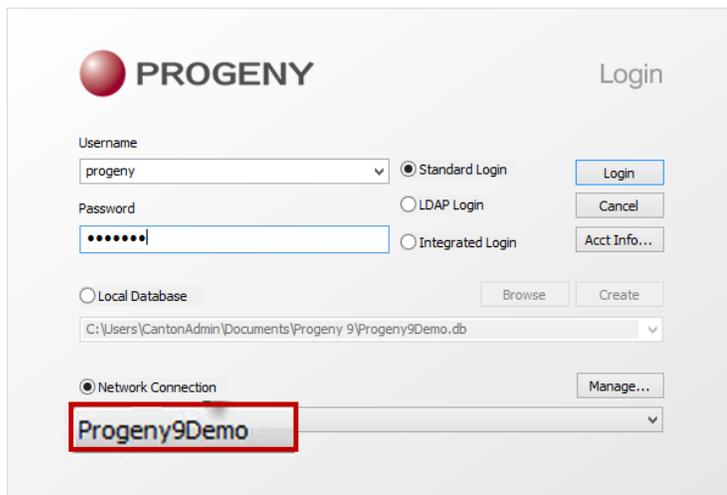
Input the following and click Save→



Connection Name – Connection display name, can be any value. →

Database Service – Broadcast Name ([\\$\\$\\$\\$ from network service configuration](#)). →

Host Address – Database server IP address plus port number →



←Back on the login screen, click the dropdown menu below the Network Connection and choose the new database connection from the list. Enter the user name and password then click Login to connect to the database.

For more information on the database see [Database Organization](#), [Database Queries and Searches](#), [Spreadsheet Basics](#).

For detailed information on other aspects of Progeny Clinical see [Drawing and Customizing Pedigrees](#), [Managing Pedigrees](#), [Managing Individuals](#) and [Managing Samples](#).

For complete details refer to [Progeny User Guide](#) or

[online User Guides](#).