



# **Clinical Quick Start Setup for Progeny Administrator**

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# Clinical Quick Start Setup for Progeny Administrator

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 <u>blue</u>, 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

## **Database Creation**

- Create Progeny Database
- Configure Core Database Options
- □ Initialize Automated Backups

## Define Database Structure

- Add User Classes
- Create Field Folders and Fields
- Create Pedigree Template Folders
- Define Initial Formats:
- 1. Individual Datasheet
  - 2. Pedigree Datasheet
  - 3. Icon Subtext
  - 4. Icon Symbols
  - 5. <u>Pedigree Fields</u>
  - 6. <u>Pedigree Display Properties</u>
- Apply Template Formats to Folder
- Add User Accounts
- **Database Deployment**
- Create Network Database Service
- □ <u>Create Desktop Client Network Connection</u>

## **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."

PROGENY Login
Usernane progeny
C:\Users\CantonAdmin\Documents\Progeny9Demo.db  C:\Users\CantonAdmin\Documents\Progeny9Demo.db  V
Onetwork Connection         Manage           Public Demo D8         V
<b>y</b> .

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

 $\leftarrow$  Browse to the location in which the database is to be saved.

For more information see <u>Creating a Progeny Database</u>.

## Configure Core Database Options $\rightarrow$

Name

Progeny9Demo.db

🚖 Favorites

📰 Desktop

Download

Homegroup
 Homegroup
 This PC
 Desktop
 File name:
 Save as type: Database (".db)

Hide Folders

Recent place

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 <u>Auditing Feature</u>.

Date modified

5/5/2015 11:25 AM

Type

Save Cancel

Data Base File

File	Folders Pedi	grees Admi	nistration	Help				
Contraction New Fo	older New Ped	Indiv SS	Pedigree.		Query	Import	Reporting	O Search
	lain							
	Pedigre	es						
7	En El Loca	I.C:\Users\Car ancer Pedigre	ntonAdmin es		New Fold	der		
8		ardiovascular ndividual Stud	Pedigrees ies	E	dit Da	tabas	e Secu	rity
	i	raining		D	ataba	ise Op	tions	
<b>3</b> -					Edit LDA	P Settings		
8				Au	dit All F	Pedigree	es and In	dividuals

## 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 <u>Add and Manage User</u> <u>Classes</u>.

)	Administration	User Maintenance	×
rile	olde	Users	Add User
∾Us	ser Maintenance	User Name Created By Date Created Pwd Changed Date Locked	Delete
G MR	Active Connections	JerryS progeny 9/12/2014     progeny progeny 11/30/2009	Change Pwd
	Field Audit Report	Progen progeny 1/28/2011	Exit
<b>P</b>		testuser progeny 9/12/2014 9/12/2014	104
0	Cancer Pedigrees		
8	🧰 Individual Studies	User Info	
	Training	Photo First Name	
•		Last Name	
<b>5</b> -		Email	
6		Change	
		Locked Integrated Login Enable Web Client Access Administrator	
모		Use Profile Format 🗸 Manage	
		Settings	
		Security Licensing Client Interface Formats	and the same
•		Add Class	

## Create Field Folders and Fields



To add a new folder, select New Folder. Input the folder information and select Save.  $\rightarrow$ 

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





← 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 <u>Database Design</u>, <u>Database Security</u> and <u>System Fields</u>.

## **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:

٩										I	Progeny		
File Edit	View	Tools Forr	nat Help										
Save Data	int Print	Load Fmt	Save Fmt	Undo	Redo	Aa Style	Fields	Add Text	Add Tab	Properties			
Main	<u>)</u> Can	cer Example_1											
UPN			: 1	*	O Data Entr	ry 🖲 Form [	Design					Current Format:	Cancer Pedigrees
Personal In	formatio	n Health Hist	ory Cancer	History B	RCA								
	onta	ct Infor	nation			P	atient	Inform	ation		Co	nsent Status	

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

<b>9</b>	Progeny	
File Edit View Tools Format Help		
Save Data Print Load Fmt Save Fmt Undo Redo	Style Fields Add Text Add Tab Properties	
Main B Cancer Example		
O Data Entry  Form Design		Current Format: CancerPedigreeDatasheet
Tab1 Tab2 Tab3		
Assigned Research Coordinator	Pedree Created Date     A Referring Physician	
Solution Study		

- 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.  $\rightarrow$ 

For more information see <u>Managing</u> <u>Data Folders</u>, <u>Datasheet Basics</u> and <u>Template Options</u>.

ee	Save Print New Sub Ped Toggle SS Spreadsheet Palette	✓ perties	Query	Icons	Fields	Add Text	Z SmartDraw	Haplotype	Samples
:h	Main Cancer Example		<u> </u>						
	Subtext Format: Cancer Pedigrees v Symbols Forma	t: Cance	er Pedigrees		¥	Markers Fo	rmat:		
	Properties	×							
<u>aging</u> and	Frogeny         Pedigree         Individual         Line         Dimensions           Icon Subtext Font         Icon Subtext Font         Icon Subtext Font         Icon Subtext Font         Icon Subtext Font								
	Arial     9       Line Width (0-10):     0       Pedigree Scale:     100       W Match Spouses       Y Match Spouses       Y Match Spouses       Y Conserve Left Space		Ci	urrent Age F	first Nam	ie Age at De	eath Jo	)hn 62	Mary 6
	Vertical Grid Spacing: 27 Recalculate All Positions Proband Arrow Position: UR Show LOD Scores Use Hooks Show Blue ID# Show Date Header and Footer Information	] nes	Helen	159	Jane 45		69 Sara	h	68 M
	Footer:	η	, p	4	$\square$	Ć		_	

	Template Formats		×
Individual Datasheet:	Cancer Pedigrees		×
Pedigree Datasheet:	By CancerPedigreeDatasheet		×
Icon Subtext:	E Cancer Pedigrees		×
Icon Symbols:	Cancer Pedigrees		×
Icon Markers:	Cancer Pedigrees		×
Pedigree Drop Fields:	Cancer Pedigrees		×
	ОК С	ancel	

## 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.  $\rightarrow$ For more information on users see <u>Add Users and</u> <u>Manage Users</u>.

٩	Administration			> '	lser Mainten	ance	geoy	×
File I	olde	Users					_	Add User
N Us	ser Maintenance	User Name	Created By	Date Created	Pwd Changed	Date Locked		Delete
G Ma	Active Connections	JerryS progeny	progeny progeny	9/12/2014 11/30/2009				Change Pwd
	Field Audit Report	B progen	progeny	1/28/2011	0/10/0014			Exit
5	□	o testuser	progeny	9/12/2014	9/12/2014			Const By
&	Cardiovascular Pedigrees 	User Info						
1	·····•	Photo	First Name Last Name					]
<b>×</b> -			Email					

## Database Deployment

Create Network Database Service

Double click SQL Anywhere12 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 <u>MUST</u> begin with a letter and cannot contain any spaces or symbols. When the service name is chosen click Next>.



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



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



← 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, <u>**DO NOT**</u> 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.  $\rightarrow$ 



## Create Desktop Client Network Connection

Username		
progeny	<ul> <li>Standard Login</li> </ul>	Login
Password	O LDAP Login	Cancel
	O Integrated Login	Acct Info.
O Local Database	Browse	Create
C: \Users\CantonAdmin\Documents\Progeny 9\Pr	ogeny9Demo.db	
Natural Conservation		Mana
Network Connection		Mana

← Select the Network Connection and then Manage.

Input the
following
and click
Save $\rightarrow$

<u>Connection Name</u> – Connection display name, can be any value.  $\rightarrow$ 

<u>Database Service</u> – Broadcast Name (\$

<u>Host Address</u> – Database server IP address plus port number  $\rightarrow$ 

Login
Cancel
Jancer
t Info
Oreate
anage



← 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 <u>Database</u> <u>Organization</u>, <u>Database Queries and Searches</u>, <u>Spreadsheet</u> <u>Basics</u>.

For detailed information on other aspects of Progeny Clinical see <u>Drawing and Customizing Pedigrees</u>, <u>Managing</u> <u>Pedigrees</u>, <u>Managing Individuals</u> and <u>Managing Samples</u>.

For complete details refer to Progeny User Guide or

online User Guides.