

Clinical “Windows” Quick Start for Progeny End User

The quick start guide will allow end users to follow a check list of topics to learn how to use Progeny. Users can follow this path to learn how to use Progeny for the first time or to gain an efficient understanding of the initial steps to using Progeny. 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.

“Windows” End User Checklist

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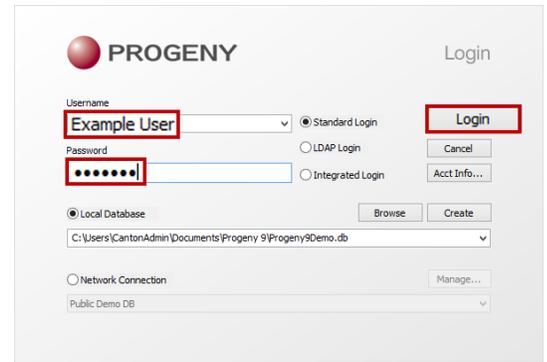
Progeny

Each user should be provided a user name and password from the **organization's Administrator**.

Launch and Login



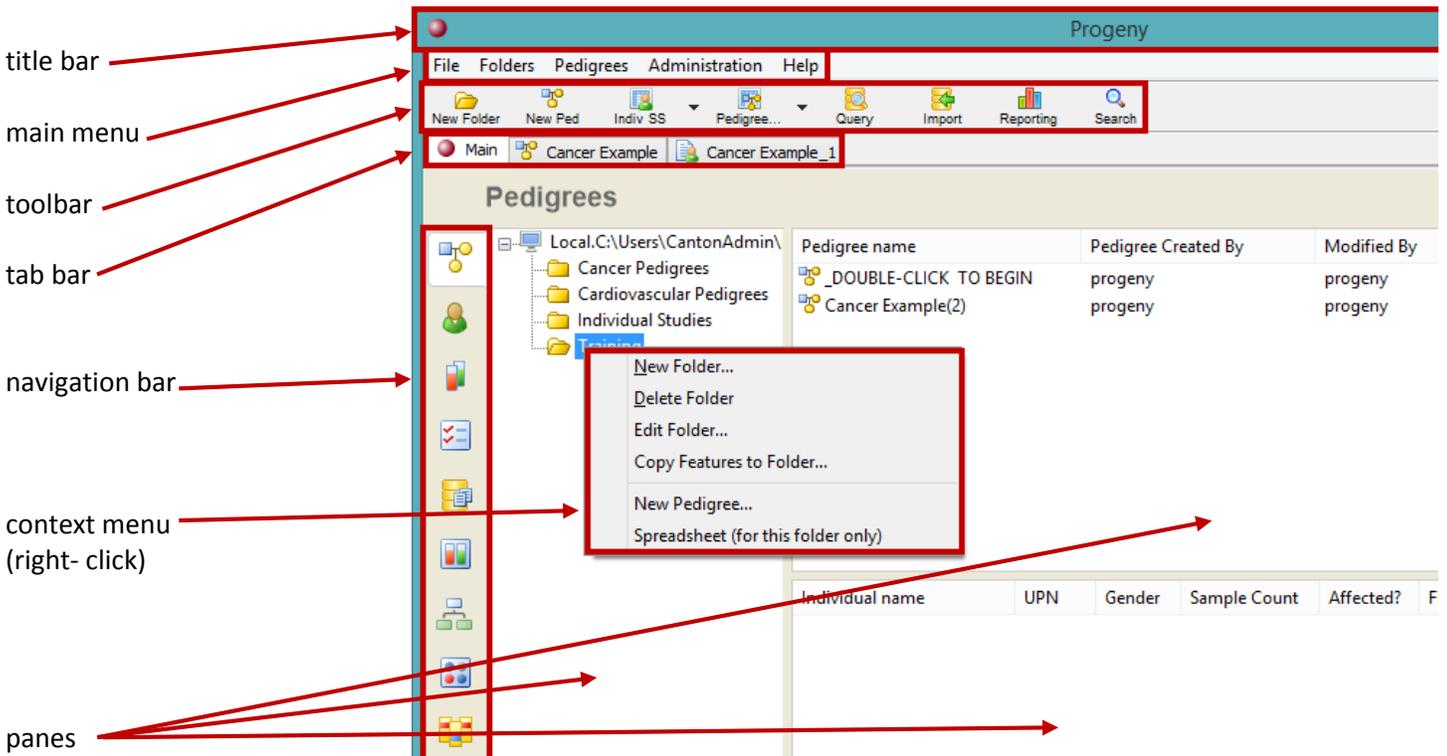
← Launch the Progeny application.



On the Login window input username, password and click Login. →

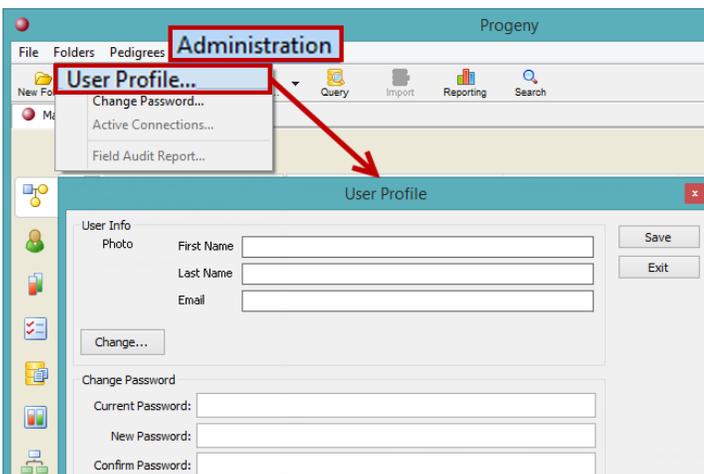
Navigate

The Progeny main window opens and has seven major components:



For more information see [Progeny Navigation Bar](#) and the [Progeny Toolbar](#).

Manage User Profile



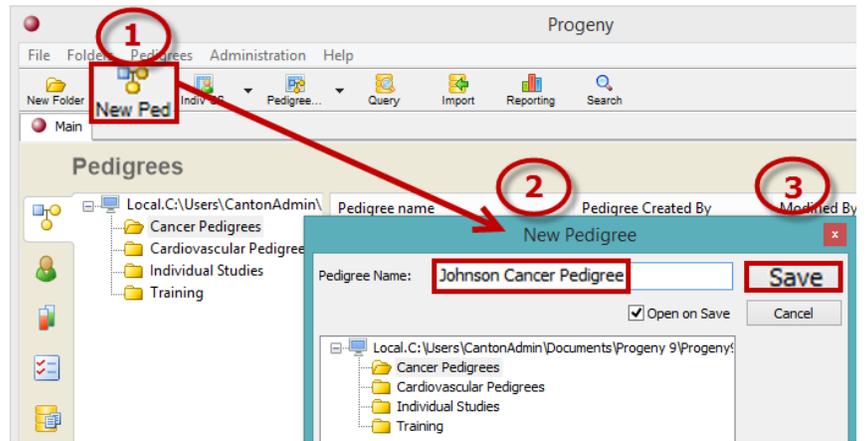
← Click Administration and select User Profile. Here users can edit name, email, password and profile picture.

Pedigree

Create a New Pedigree

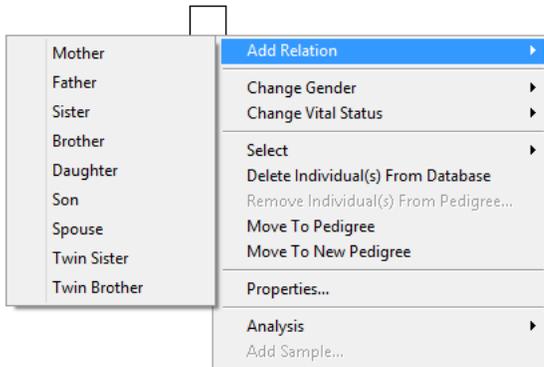
From the pedigrees main window →

1. Click New Pedigree and the New Pedigree dialog box opens.
2. Select the folder for the new pedigree (which will apply the template) and input the pedigree name.
3. Click Save (the check mark on “open on save” will open the pedigree after saving it).



Add Individuals to Pedigree

There are multiple ways to add individuals/relationships:

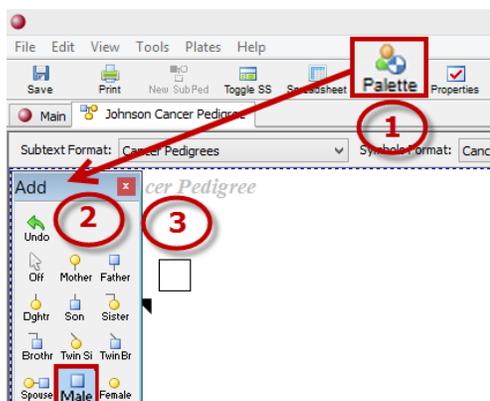
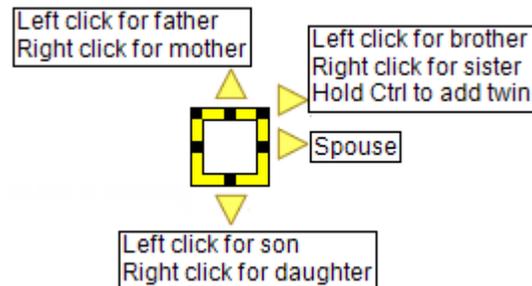


← Use Individual Context Menu (right- click)

1. Right- click the individual to add a relationship.
2. Select Add Relation.
3. Select relationship type and a new icon will appear with the relationship connection.

Use One - Click →

1. Select the individual to add a relationship.
2. Hover the mouse over one of the yellow arrows to see the add option.
3. Select the relationship to add and a new icon will appear with the relationship connection.



← Use the Palette

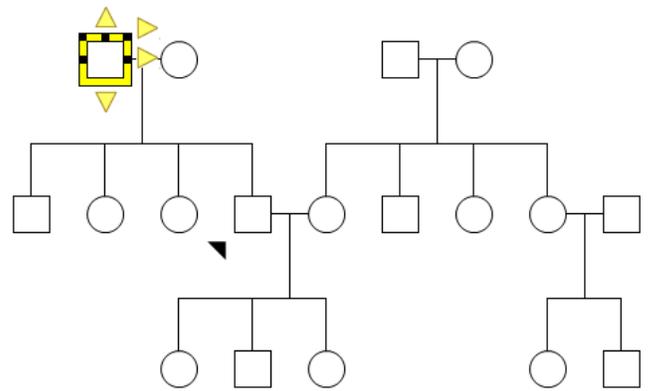
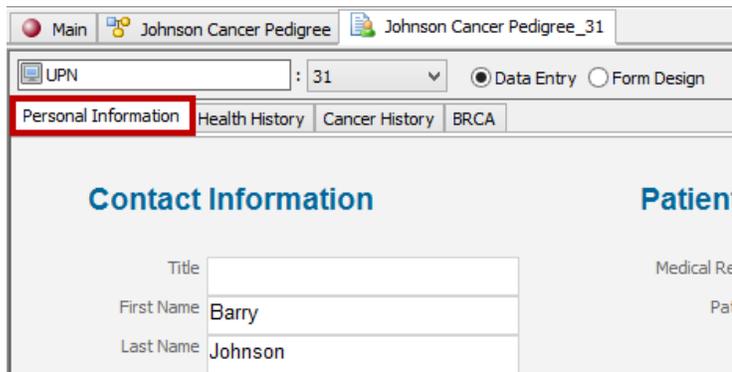
1. Select the Palette button and the Palette dialog box opens.
2. Select the type of individual (male in this example).
3. Click where the new icon belongs. Close the Palette window when finished.

For more information see [Drawing and Customizing Pedigrees](#), [Managing Pedigrees](#) and [Managing Individuals](#)

A pedigree after individuals and relationships added. →

Datasheet

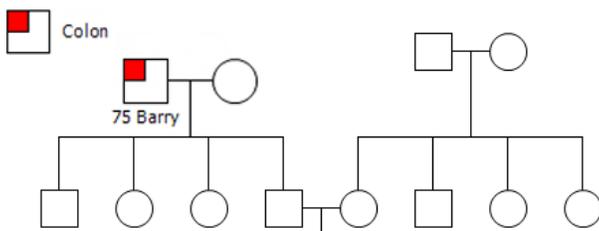
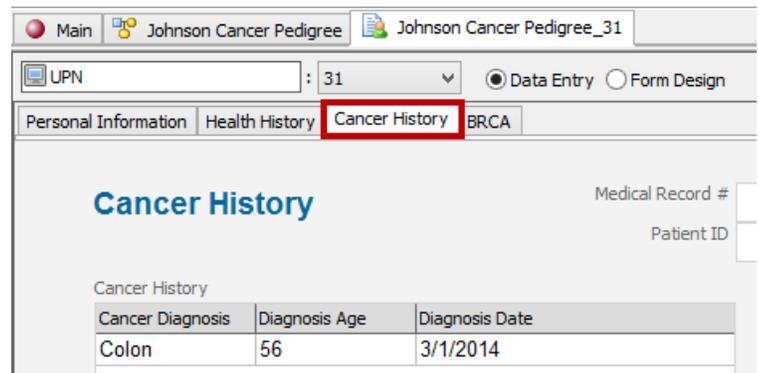
Double click an individual to open their datasheet to input diagnosis status and other information. →



← Individual datasheet

← The pedigree will display subtext for the individual if there is data for the field in the datasheet.

Enter the individual's information i.e. diagnosis on → the datasheet. Upon saving the datasheet, the pedigree will generate the Symbols Legend (based on template configuration) and indicate the diagnosis and any subtext for the individual's icon. For more information see [Datasheet Basics](#).



← Updated pedigree with Symbols Legend and individual diagnosis.

Spreadsheet

A spreadsheet is a table of values that are arranged in rows and columns. Unlike a datasheet, which displays the data for a single individual, pedigree or sample, a spreadsheet displays the data for all individuals, all pedigrees, or all samples in a Progeny database.



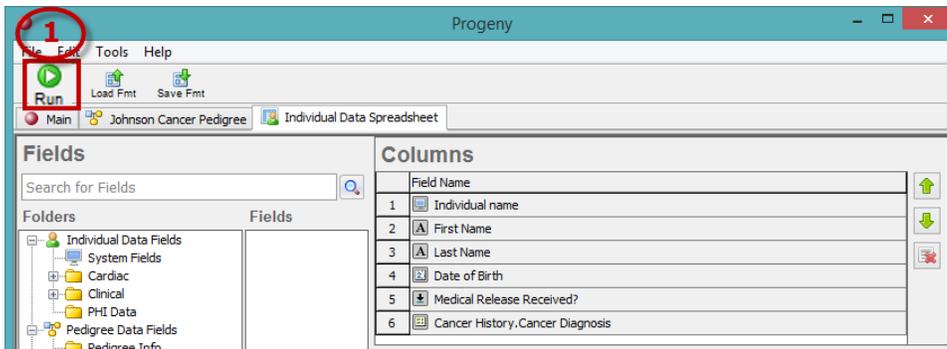
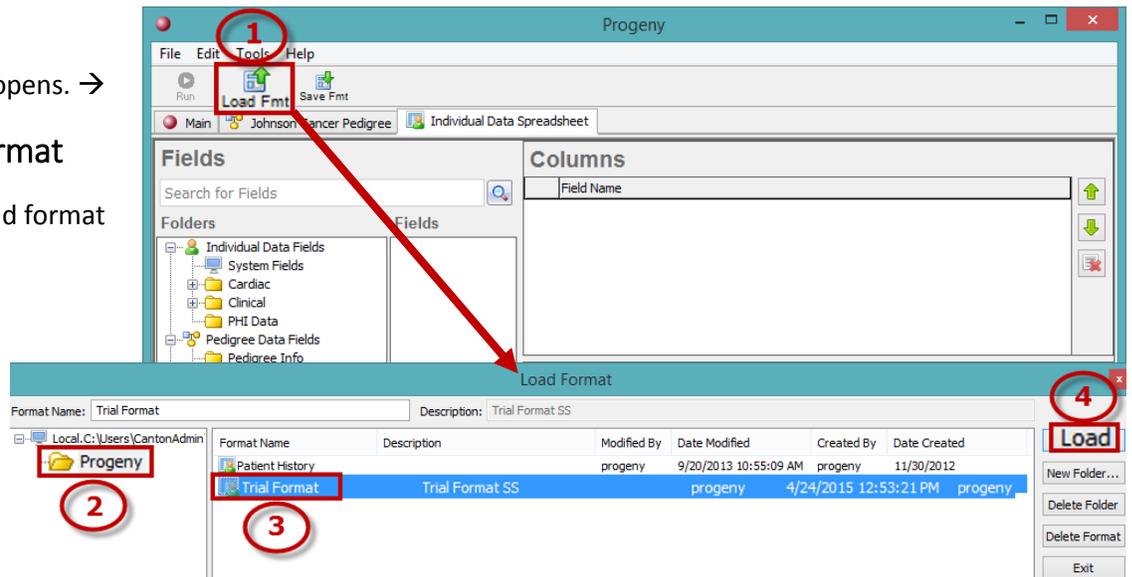
From the spreadsheet window users can load a spreadsheet format, generate a new spreadsheet and save a new spreadsheet format.

← Click Indiv SS from the toolbar and choose Create New Individual Spreadsheet.

The spreadsheet window opens. →

Load Spreadsheet Format

1. Click Load Fmt, the load format window opens.
2. Select the folder.
3. Select the format.
4. Click Load.



← The format loads in the spreadsheet window.

Run Spreadsheet Format

1. Select Run

A spreadsheet is generated with the above configured columns:

	Individual name	First Name	Last Name	Date of Birth	Medical Release	Cancer History.Cancer Diagnosis
16						Lymph Nodes
17	Cancer Example_2	Mary	Smith	1/3/1922	No	
18						Breast
19	Cancer Example_4	Sarah	Smith	8/9/1945	No	
20						Breast
21						Colon
22	Cancer Example_5	Marnie	Smith	12/3/1946	Yes	
23	Cancer Example_6	Jane	Jones	11/7/1947		

Enter Data into Spreadsheet

Click in the cell and enter the needed data, or select the data from a dropdown list. Fields that are highlighted in gray are read-only fields, such as system fields or lookup table subfields, and will not allow data entry. To move from one field to the next within the same row, press the Tab key on the keyboard. To move back a field within the same row, press and hold the Shift key and then press the Tab key. To move from one row to the next, press the Enter key (pressing the Enter key does not delete the data in a spreadsheet cell). Right-click to use the options to add/delete row on the spreadsheet or to open the datasheet.

Build Spreadsheet

Use the Fields pane to search or browse for fields to drag into columns, sort or query panes →

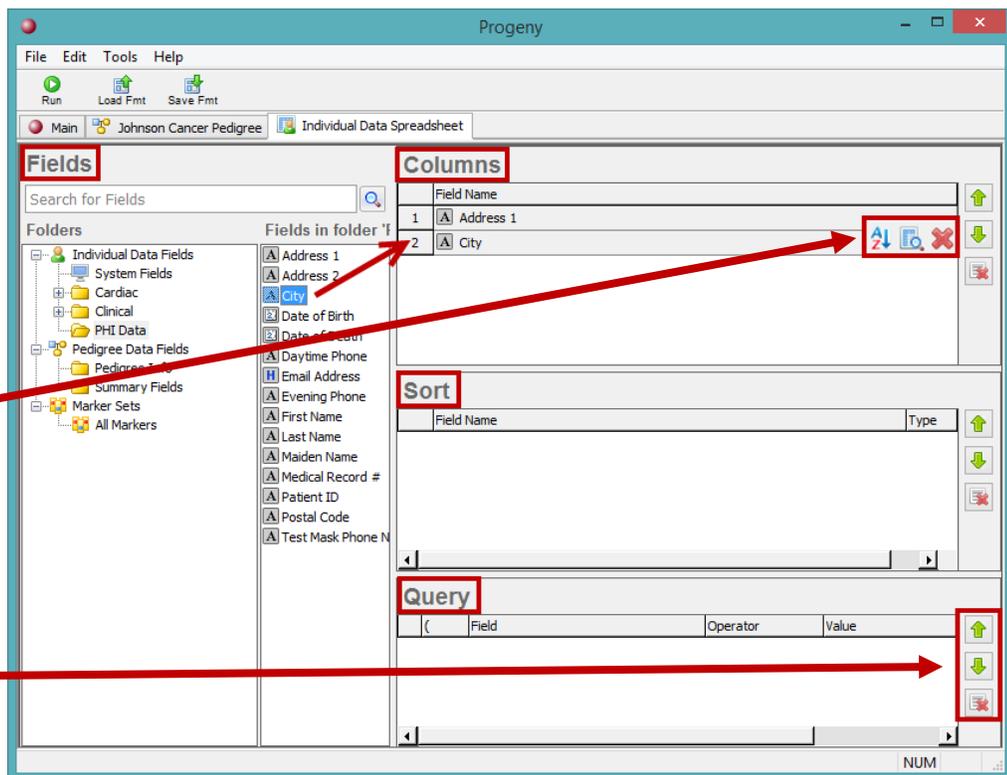
Add a field to the Columns pane and hover over its row, the following three icons appear on the right side.

-  Adds row to Sort pane.
-  Adds row to Query pane.
-  Deletes row from Columns pane.

 Moves the selected field/row up one position in the order

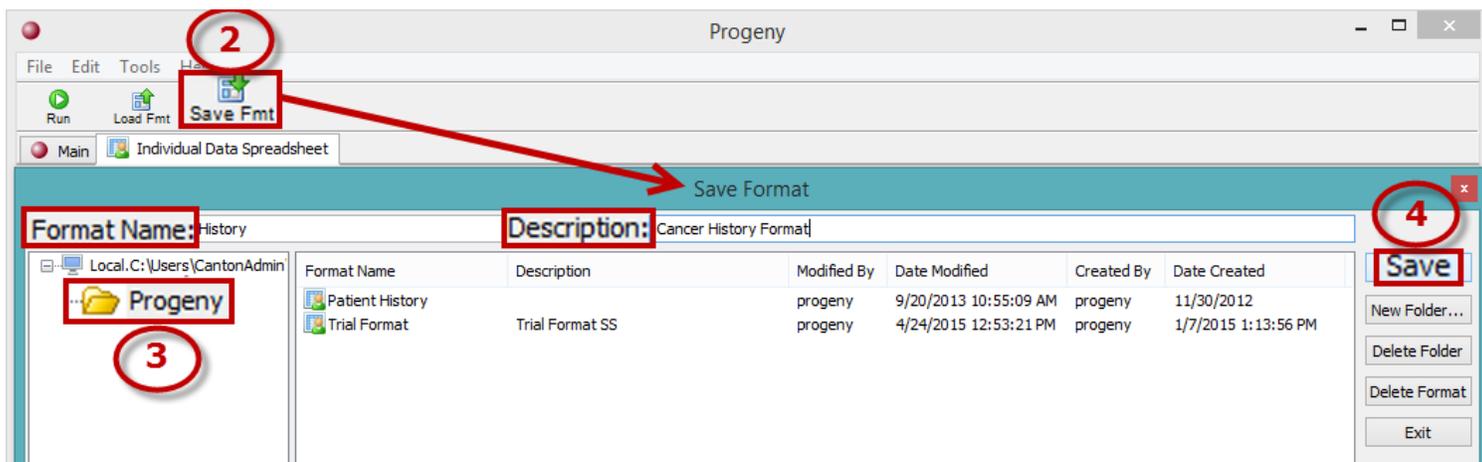
 Moves the selected field/row down one position in the order

 A so-called “Nuclear Option,” this button will delete all fields/rows within the selected pane.



Save Spreadsheet Format

1. [Build the spreadsheet](#) as needed.
2. Click Save Fmt. The Save Format dialog box opens. Enter name and Description for the format.
3. Select an existing folder.
4. Click Save.



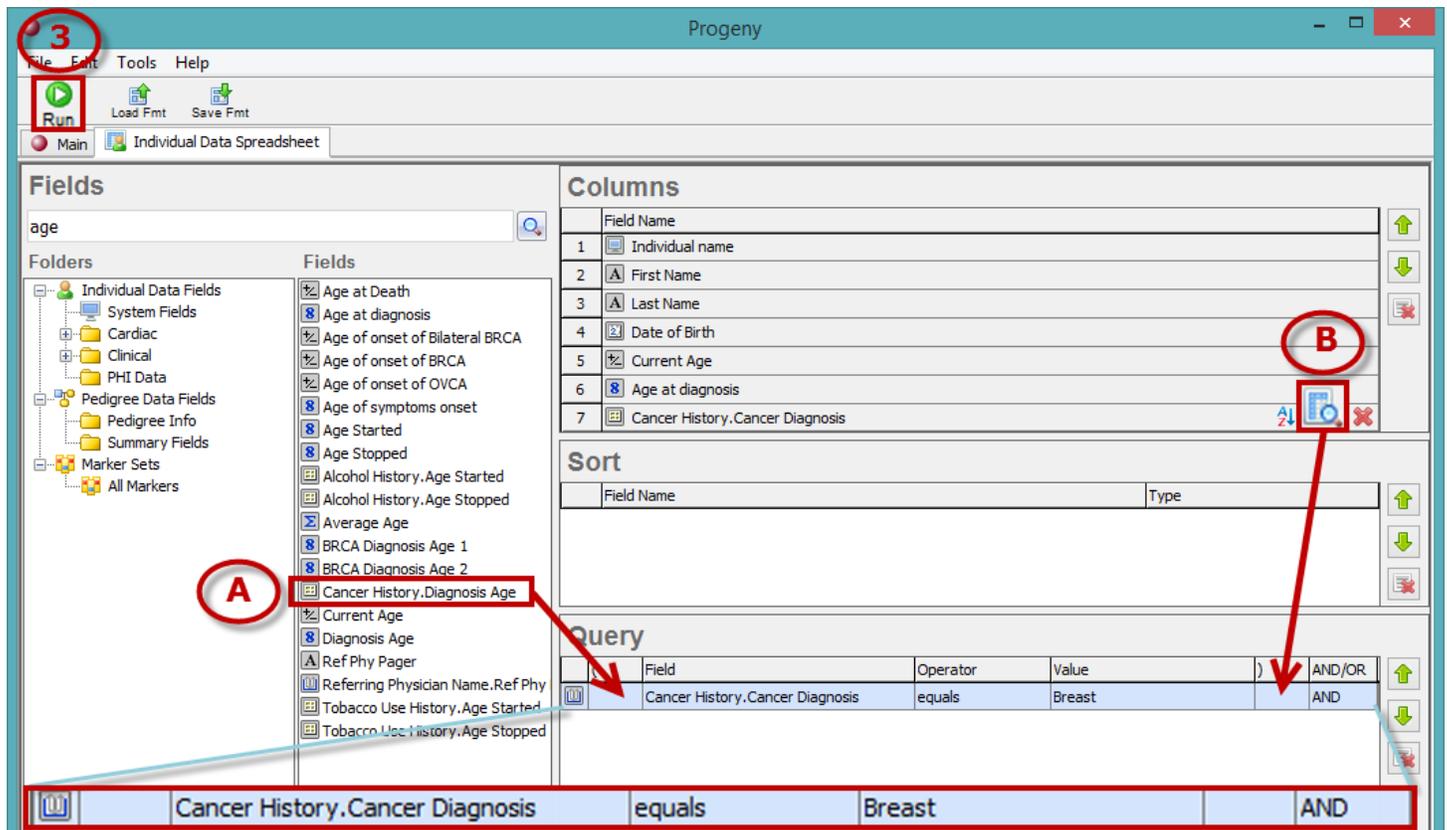
Spreadsheet Query

Query within the Progeny database to retrieve a specific subset of data. When formatting the spreadsheet for the query, the spreadsheet does not have to contain the fields against which the query was run. For example, to set up a query for all female individuals under the age of 50 that have been diagnosed with bilateral breast cancer, the spreadsheet is to display the demographic information for the individuals who meet the query criteria. Set up the spreadsheet with the following fields—First Name, Last Name, Age at Diagnosis, Current Age, and so on, but it is not necessary to include the Gender field and the BRCA Diagnosis1 field as these fields would display the same value (Female or BL BR, respectively) for all the individuals who are retrieved by the query. For information on query operators access [Database Queries and Searches](#).

Run Spreadsheet Query

Either [Build a spreadsheet](#) or [Load Spreadsheet Format](#) and then:

1. Add/ remove Fields in the Columns pane to generate the query output format.
2. Add Fields to the Query Pane
 - a. Drag and drop fields from the Fields pane into the Query pane.
 - b. Click the Query button for a field within the Columns pane to add to the Query Pane.
 - i. To remove a row from the Query pane, either right-click the field and choose Delete Row or click the  button on the right side of the query row.



The screenshot shows the Progeny software interface. At the top left, the 'Run' button is circled in red and labeled with a red '3'. In the 'Fields' pane on the left, 'Cancer History.Diagnosis Age' is circled in red and labeled with a red 'A'. In the 'Columns' pane on the right, the 'Query' button is circled in red and labeled with a red 'B'. Below the 'Columns' pane, the 'Query' pane shows a query: 'Cancer History.Cancer Diagnosis equals Breast AND'. At the bottom of the interface, a red box highlights the query results: 'Cancer History.Cancer Diagnosis equals Breast AND'.

3. Click Run  to run the query. The results of the query are displayed onscreen in the spreadsheet:

	Individual name	First Name	Last Name	Date of Birth	Current Age	Age at diagnosis	Cancer History.Cancer Diagnosis
1	Cancer Example_2	Mary	Smith	1/3/1922			
2							Breast
3	Cancer Example_4	Sarah	Smith	8/9/1945	69		
4							Breast
5	Cancer Example_6	Jane	Jones	11/7/1947			
6							Breast
7	Cancer Example_18	Missy	Smith	1/1/1970	45		
8							Breast

For more information see [Spreadsheet Basics](#) and [Database Organization](#). For complete details refer to [Progeny User Guide](#) or [online User Guides](#).