



Client Workflow Interface (Dashboard) Quick Start Guide

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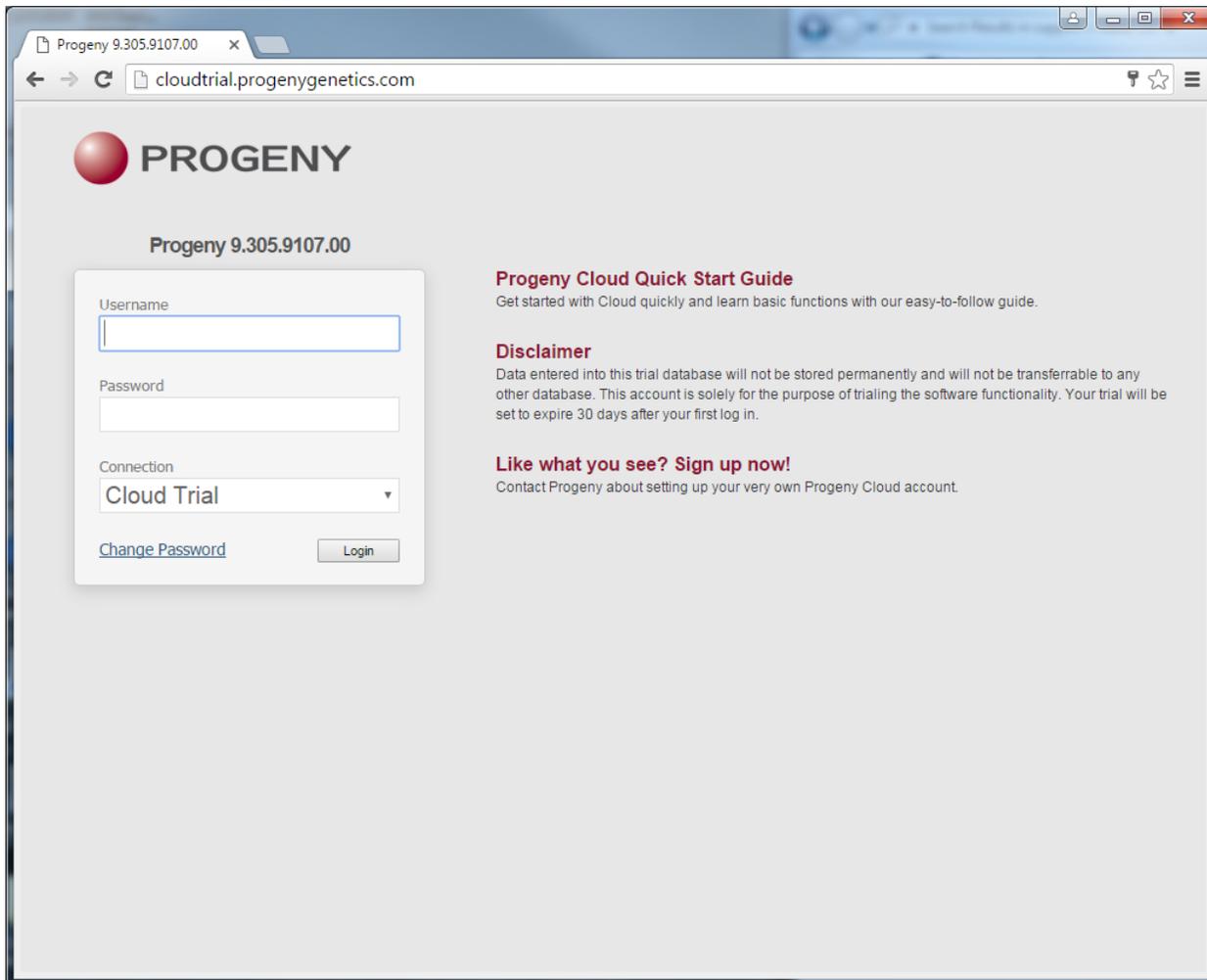
The Quick Start Guide will walk you through the initial steps of using the Progeny Client Workflow Interface (Dashboard) through your web browser. Each section contains a list of topics that are hyperlinks to instructional content. If information appears in [blue](#), it is a hyperlink to the topic within this document. Let's get started.

Dashboard User

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- [Build \(an Individual\) Spreadsheet](#)
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Log into the Progeny Cloud Trial

1. Open your web browser and go to cloudtrial.progenygenetics.com.
2. Enter the **Username** and **Password** assigned to you and click **Login**.



The screenshot shows a web browser window with the address bar displaying "cloudtrial.progenygenetics.com". The page features the Progeny logo (a red sphere) and the text "PROGENY". Below the logo, it says "Progeny 9.305.9107.00".

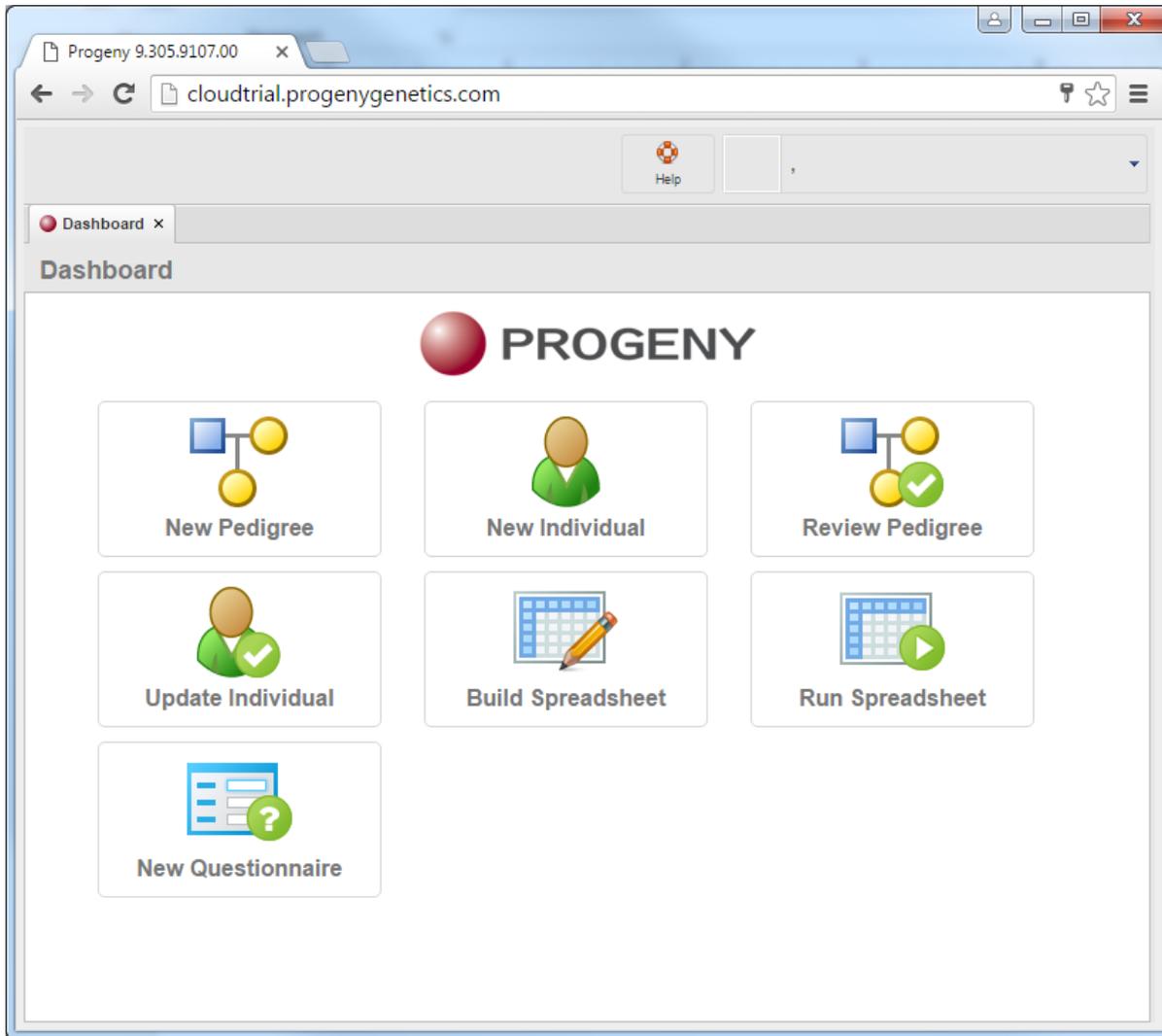
On the left side, there is a login form with the following fields and elements:

- Username:** A text input field.
- Password:** A password input field.
- Connection:** A dropdown menu currently set to "Cloud Trial".
- Change Password:** A link below the password field.
- Login:** A button at the bottom right of the form.

On the right side of the page, there are three sections:

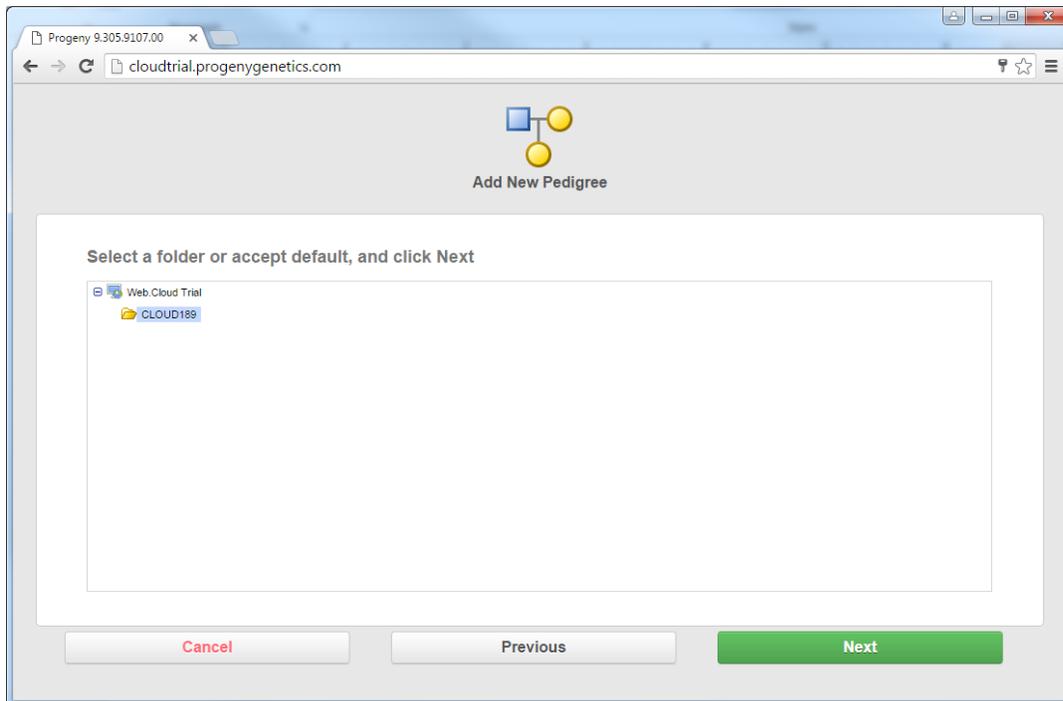
- Progeny Cloud Quick Start Guide:** A heading followed by the text "Get started with Cloud quickly and learn basic functions with our easy-to-follow guide."
- Disclaimer:** A heading followed by the text "Data entered into this trial database will not be stored permanently and will not be transferrable to any other database. This account is solely for the purpose of trialing the software functionality. Your trial will be set to expire 30 days after your first log in."
- Like what you see? Sign up now!** A heading followed by the text "Contact Progeny about setting up your very own Progeny Cloud account."

3. The Dashboard displays as shown below.

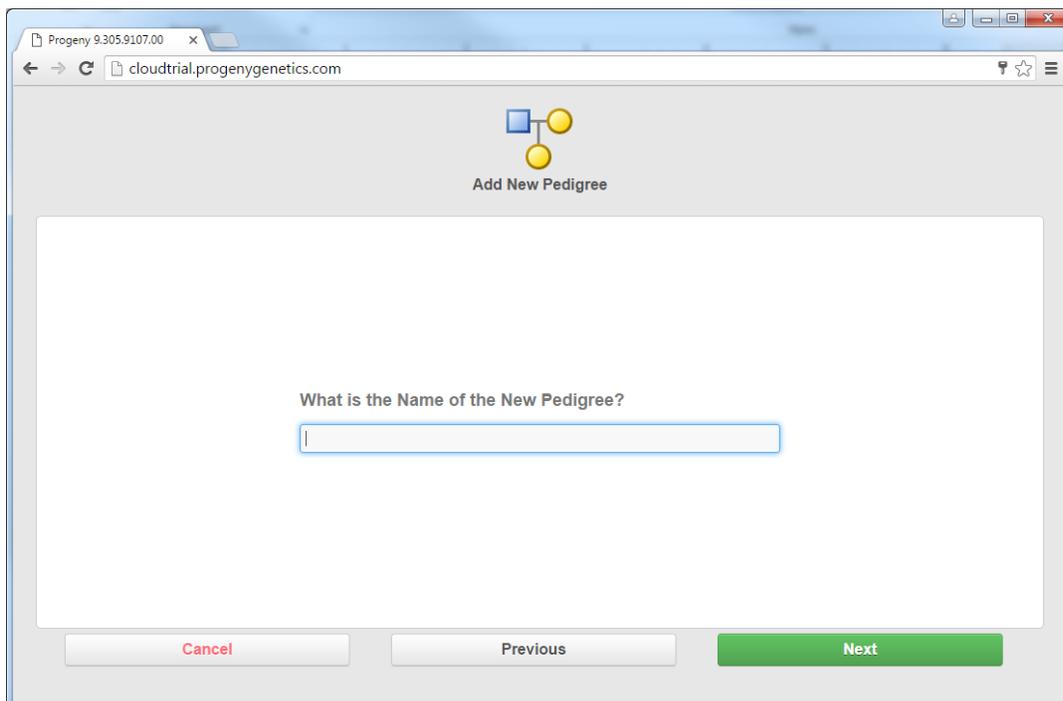


Create a New Pedigree

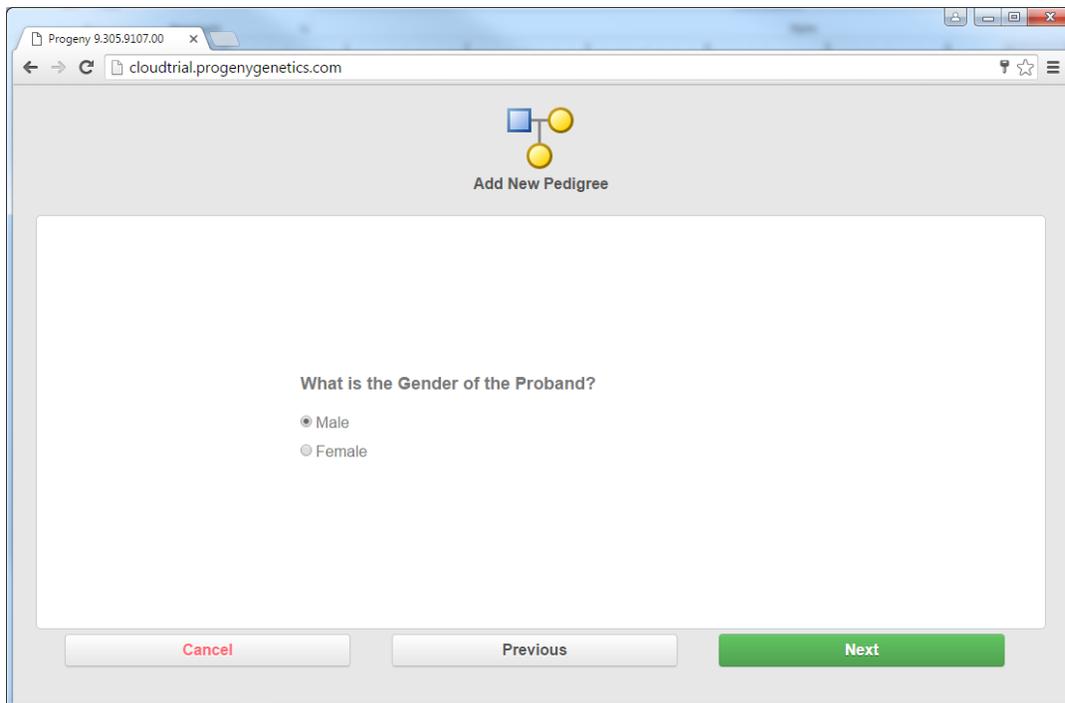
1. Select **New Pedigree**.
2. Select the folder (if not already selected) and click **Next**. This screen will only display folders that are available to you. In the cloud trial you will only be able to view your respective folder.



3. Input a name for your pedigree and click **Next**.

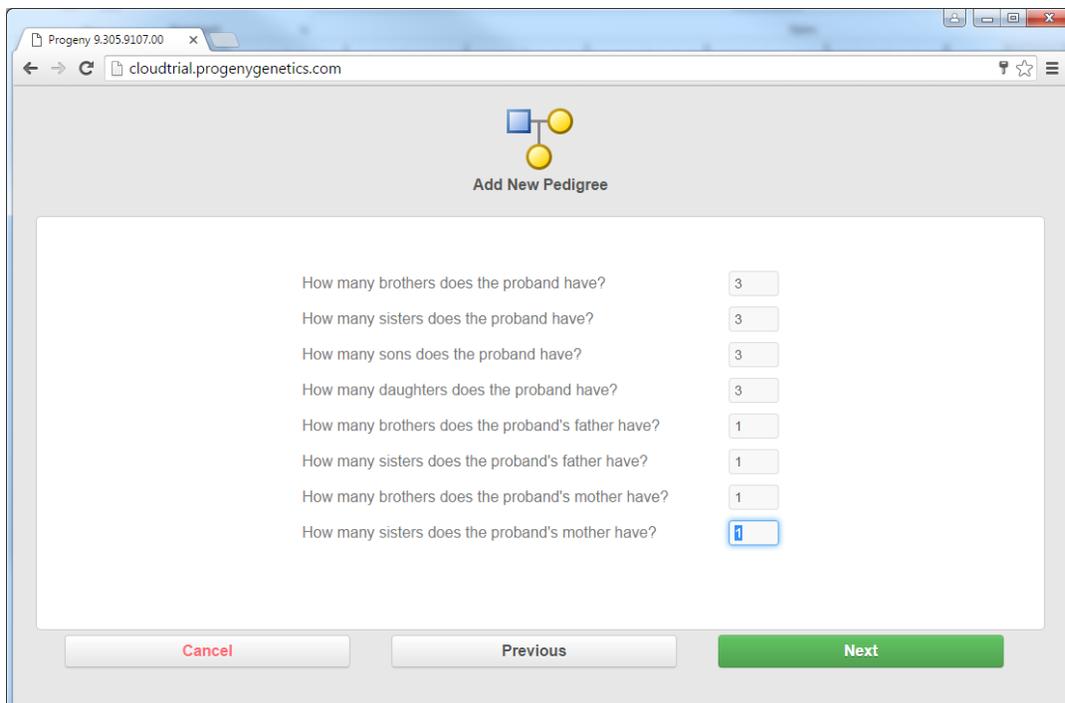


4. Select the proband's gender, click **Next**.



The screenshot shows a web browser window with the URL `cloudtrial.progenygenetics.com`. The page title is "Add New Pedigree" and features a pedigree icon. The main content area asks "What is the Gender of the Proband?" with two radio button options: "Male" (selected) and "Female". At the bottom, there are three buttons: "Cancel" (red text), "Previous" (grey), and "Next" (green).

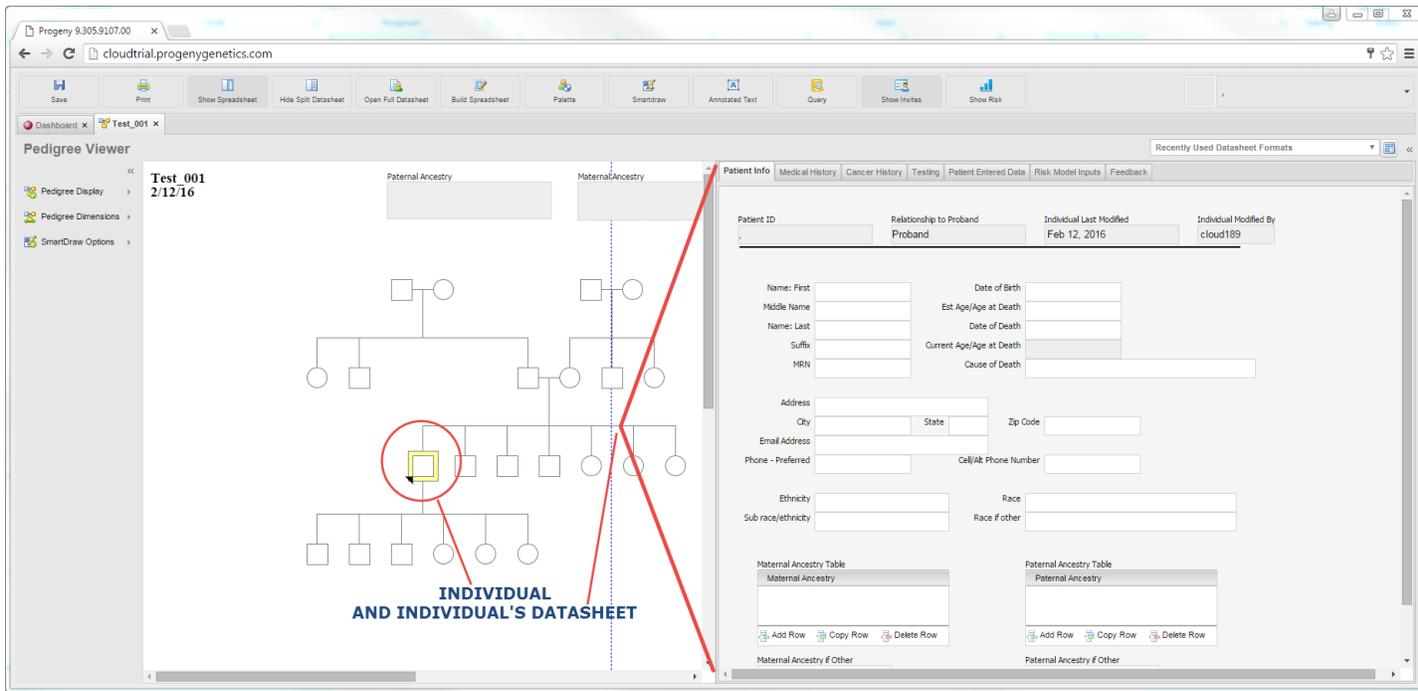
5. On the table for how many relatives the proband has, click in the first field to enter a value then use your tab button to move down the list and enter more values. When you're finished, click **Next**.



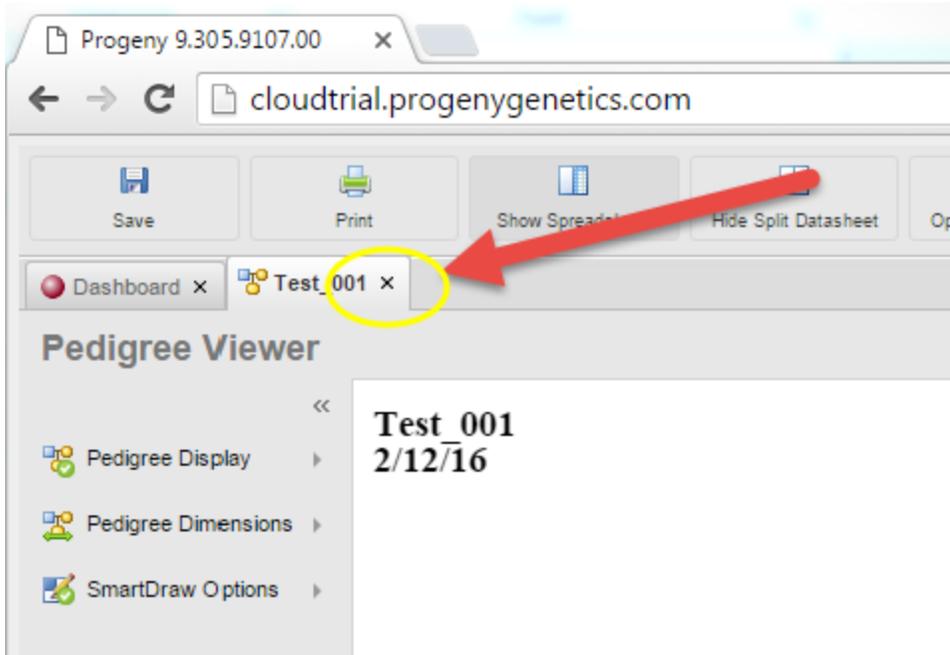
The screenshot shows the same web browser window, but the form has advanced to a table of relative counts. The table has 8 rows and 2 columns. The first column contains questions about the number of relatives, and the second column contains input fields with values. The last input field is highlighted with a blue border. At the bottom, there are three buttons: "Cancel" (red text), "Previous" (grey), and "Next" (green).

How many brothers does the proband have?	3
How many sisters does the proband have?	3
How many sons does the proband have?	3
How many daughters does the proband have?	3
How many brothers does the proband's father have?	1
How many sisters does the proband's father have?	1
How many brothers does the proband's mother have?	1
How many sisters does the proband's mother have?	1

6. A pedigree is generated on the left half of your browser window based on the data you entered as shown below. On the right half a datasheet is displayed ready for you to enter data for the selected individual on the pedigree shown highlighted in yellow on the pedigree as shown below.

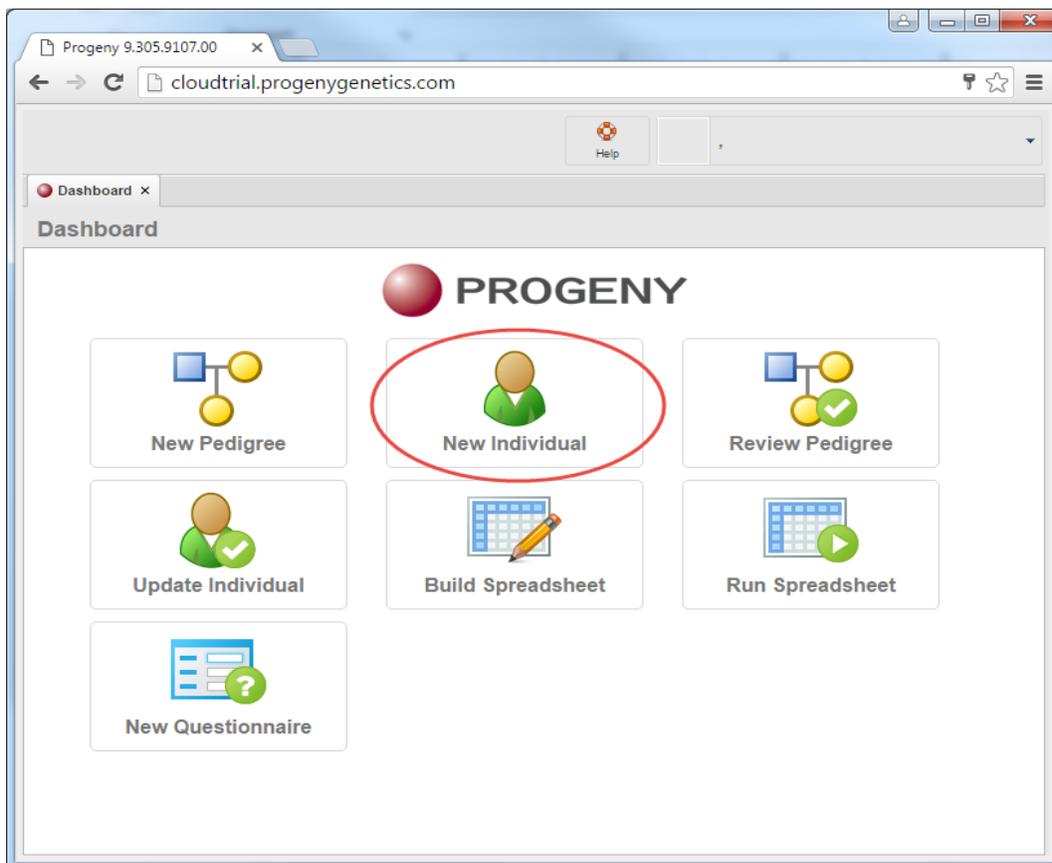


You may exit this tab by clicking the small 'x' at the end of the tab, or just click the **Dashboard** tab located below the **Save** button to return to the Dashboard and continue through this Guide.

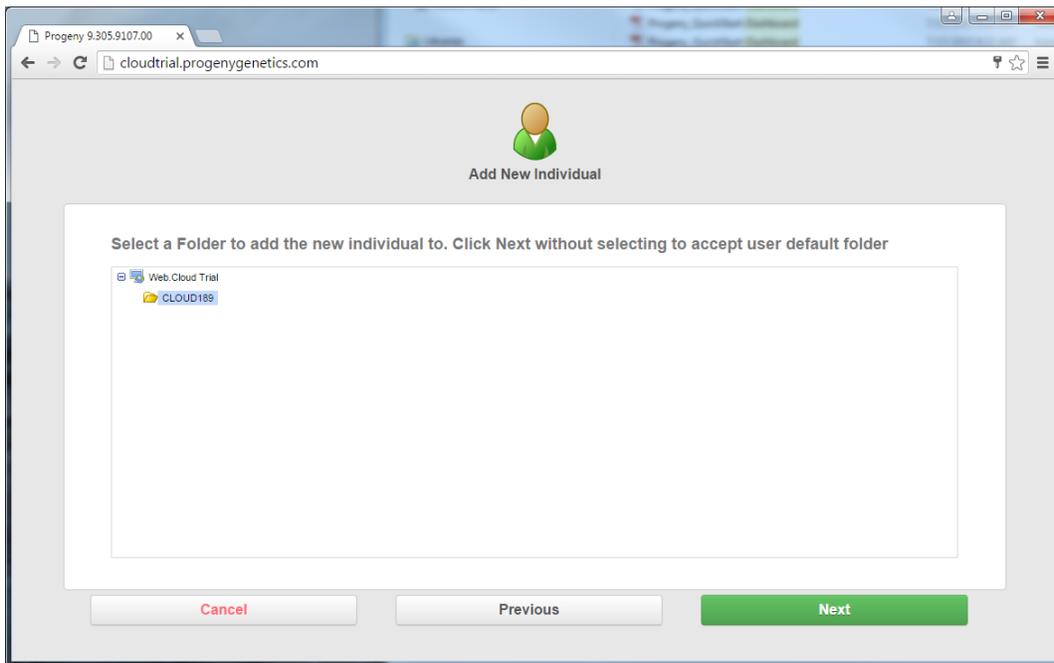


New Individual

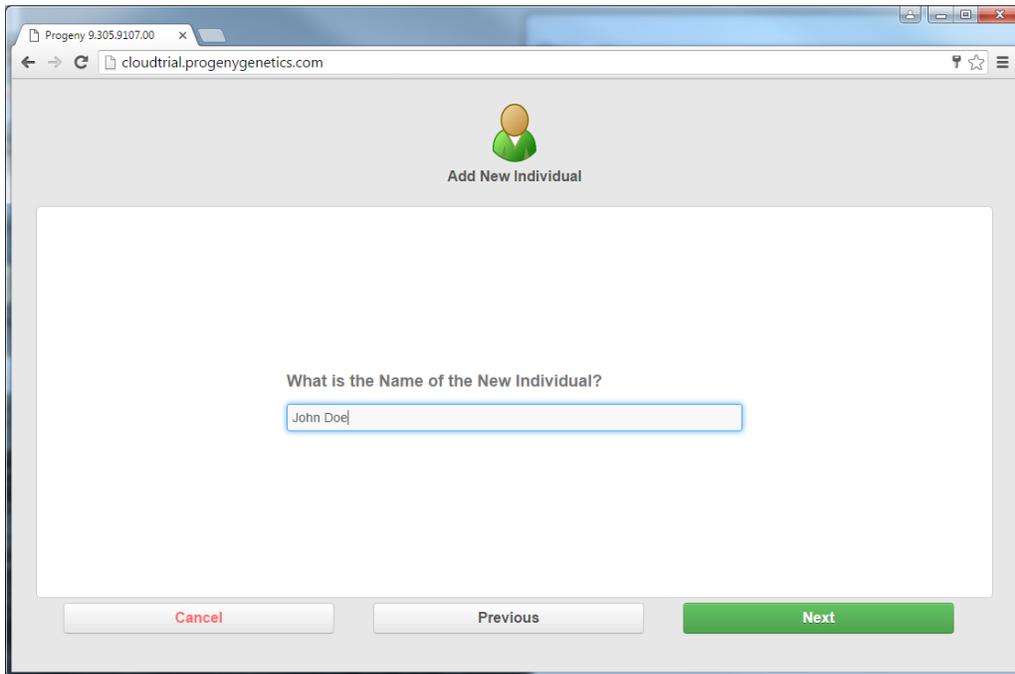
1. Select the **Dashboard** tab, then select **New Individual** as shown below.



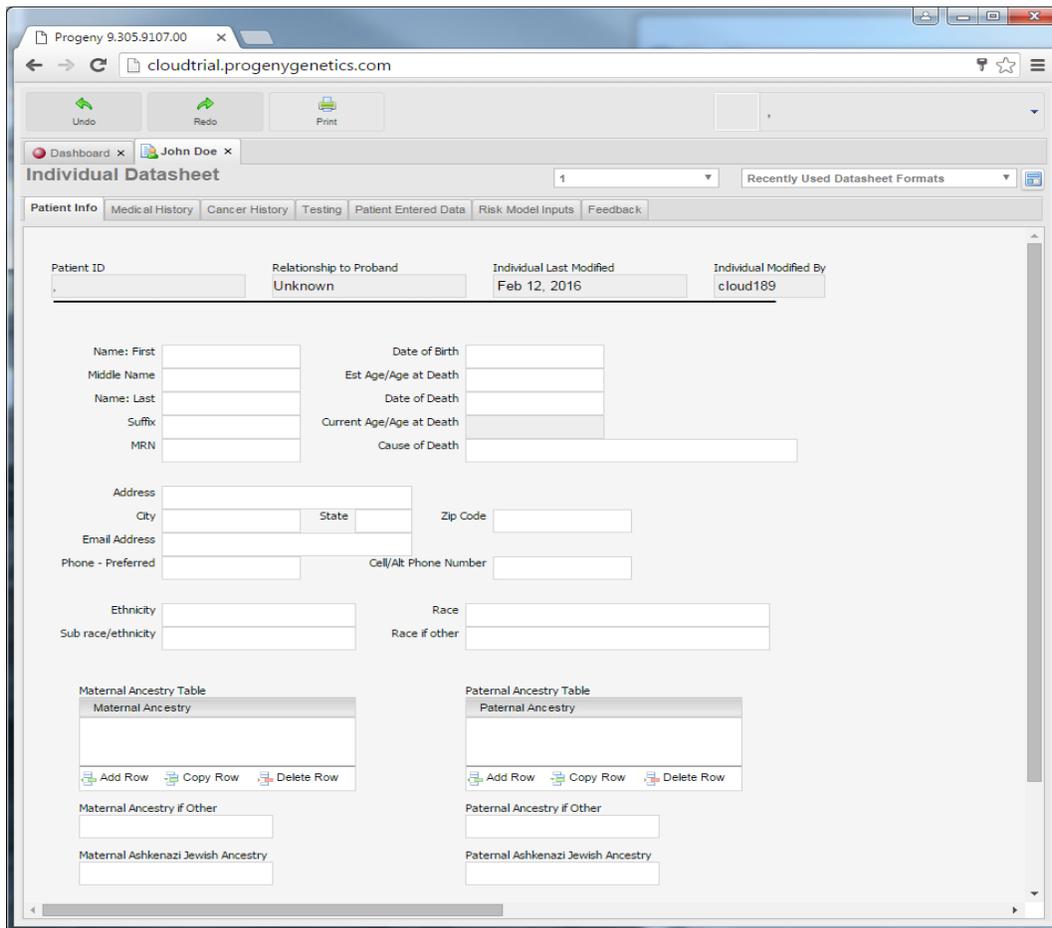
2. On the next screen select the folder (if not already selected) and click **Next**. This screen will only display folders that are available to you. In the cloud trial you will only be able to view your respective folder.



3. Input the Individual name and click **Next**.

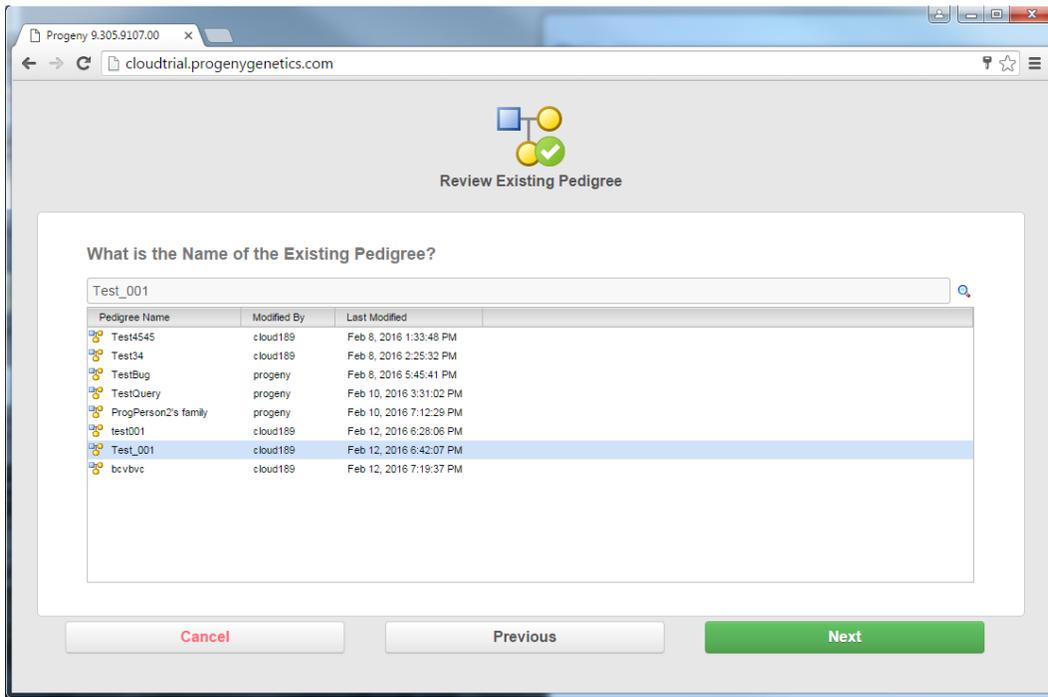


4. Select the proband's gender, click **next**, and the new individual datasheet will open as shown below.

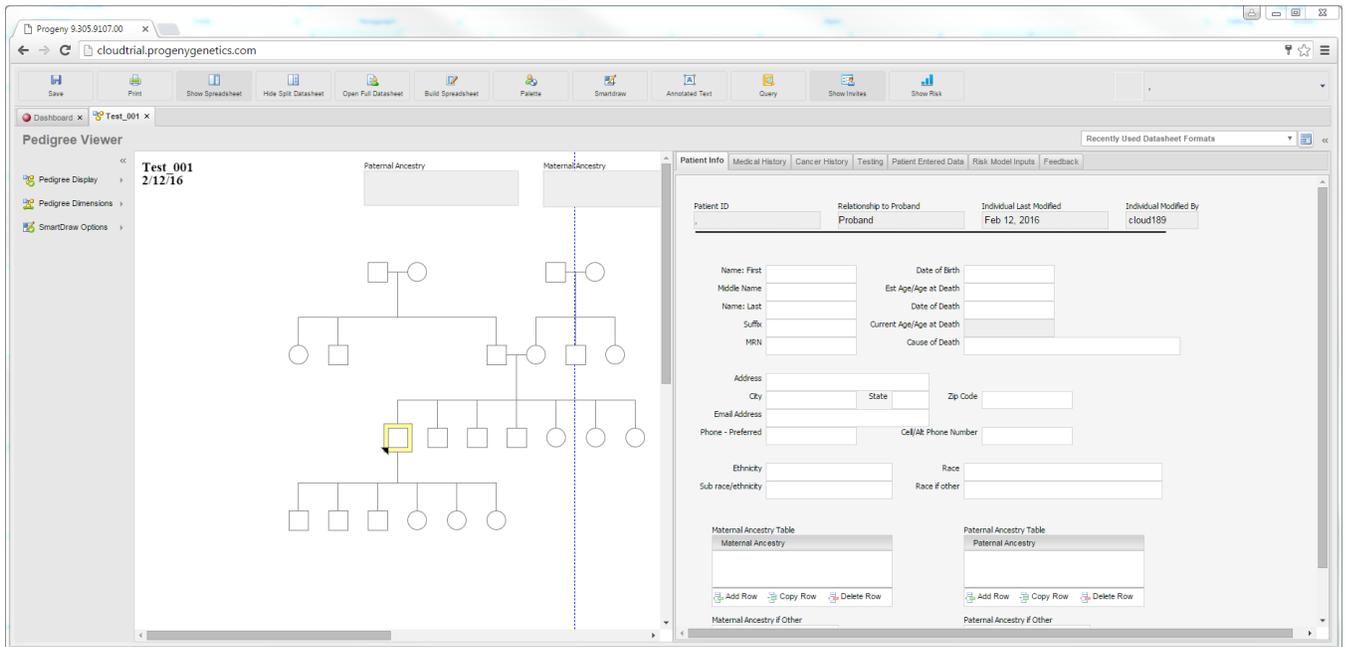


Review Pedigree

1. Return to the **Dashboard** as explained earlier, then select **Review Pedigree**.
2. Select your desired pedigree and click **Next**. This page will display a list of existing pedigrees in the database. In this example you could search data that pertains to any of the three columns above the list of pedigrees (Pedigree Name, Modified by, Last modified date). Additional columns can also be added.



- The pedigree opens along with the default split datasheet as shown below. You may also close this split datasheet by selecting the hide split datasheet button in the menu. Also, you could open a complete datasheet by selecting the "Open Full Datasheet" button in the menu.



Update Individual

1. Return to the **Dashboard** as explained earlier, then select **Update Individual**.
2. Select the desired individual and click **Next**.
3. The individual datasheet displays for the selected individual. You can either modify existing data or select fields and enter new data as needed. Changes are automatically saved. You may then close the datasheet tab by select the x on the tab (shown below) ((add picture))

Progeny 9.305.9107.00 x
cloudtrial.progenygenetics.com

Undo Redo Print

Dashboard x John Doe x

Individual Datasheet

1 Recently Used Datasheet Formats

Patient Info Medical History Cancer History Testing Patient Entered Data Risk Model Inputs Feedback

Patient ID Relationship to Proband Individual Last Modified Individual Modified By
Unknown Feb 12, 2016 cloud189

Name: First Date of Birth
Middle Name Est Age/Age at Death
Name: Last Date of Death
Suffix Current Age/Age at Death
MRN Cause of Death

Address
City State Zip Code
Email Address
Phone - Preferred Cell/Alt Phone Number

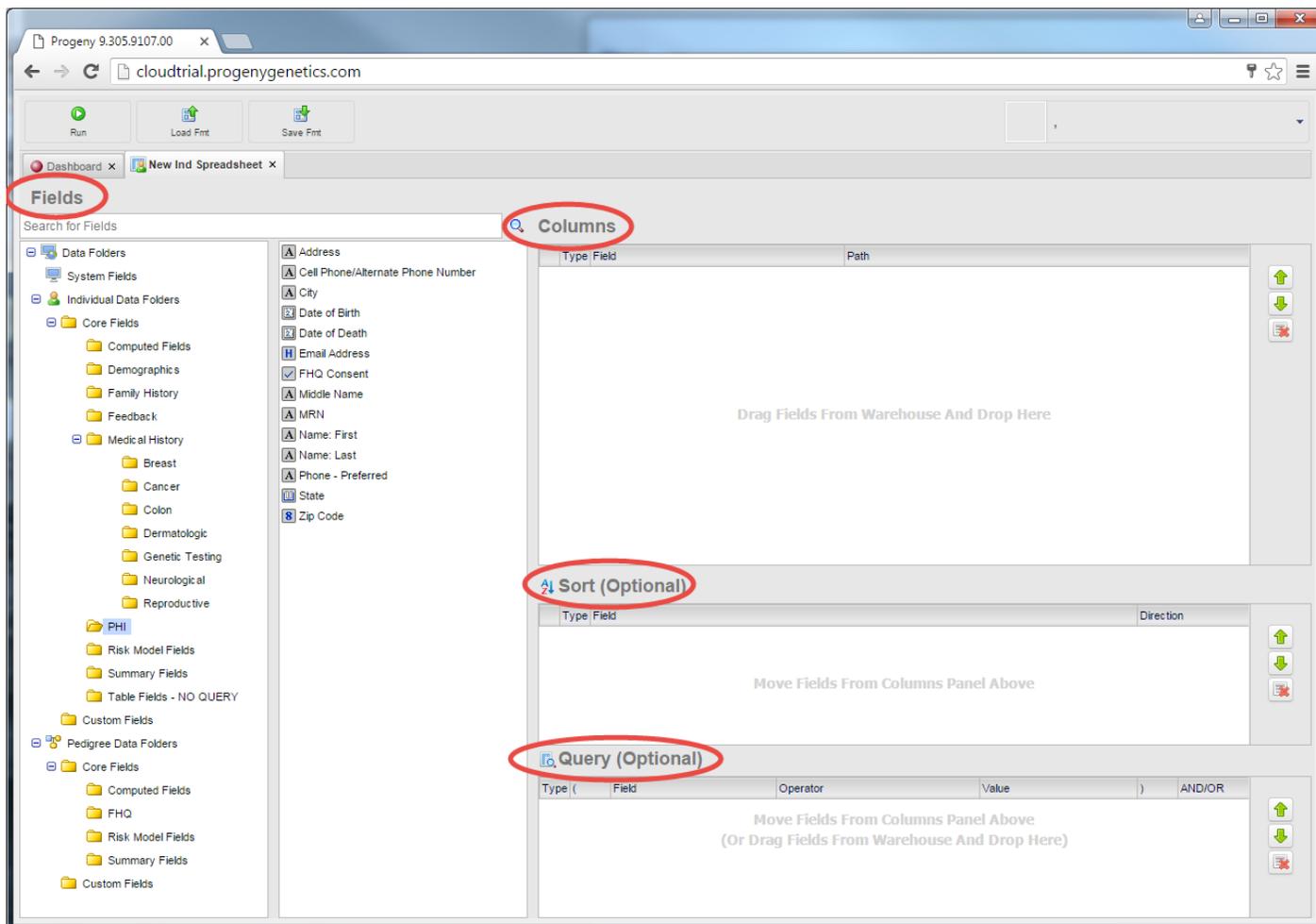
Ethnicity Race
Sub race/ethnicity Race if other

Maternal Ancestry Table Paternal Ancestry Table
Maternal Ancestry Paternal Ancestry
Add Row Copy Row Delete Row Add Row Copy Row Delete Row

Maternal Ancestry if Other Paternal Ancestry if Other
Maternal Ashkenazi Jewish Ancestry Paternal Ashkenazi Jewish Ancestry

Build Spreadsheet (Individual Spreadsheet)

1. Return to the **Dashboard** as explained earlier, then select **Build Spreadsheet**
2. The **New Individual Spreadsheet** tab opens with the following panes;



Use the Fields pane to browse or *search* for fields to *drag* into the **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.

Run (an Individual) Spreadsheet

1. Select **Run Spreadsheet**
2. Search or browse for spreadsheet format
3. Select the **Run** button (or **Next**) for the format
4. The spreadsheet displays

Web Dashboard Run Spreadsheet:

Individual Name	First Name	Last Name	Address 1	City	Cancer History	Cancer Diagnosis
Cancer Example_1	John	Smith	3503 Miami Ave.	South Bend		Lymph Nodes
Cancer Example_2	Mary	Smith	3503 Miami Ave.	South Bend		Breast
Cancer Example_4	Sarah	Smith	3503 Miami Ave.	South Bend		Breast
						Ovary
						Leukemia

New Questionnaire – Invite New Patient

1. Select **New Questionnaire**
2. Choose either **Invite New Patient** or click here for instructions on [Invite Existing Patient/Relative](#)
3. Select the Questionnaire
4. Choose the folder for the patient information (Only folders that are activated for the Family History Questionnaire will display in the folder list)
5. Input the Pedigree name
6. Gender of Proband
7. Enter patient's email
8. Enter the information requested
9. Edit content of email

Email Subject

PROGENY

Dear (Michelle Lind),

You have been scheduled for a hereditary cancer risk assessment appointment with our genetic counselor, Name here. In order to help us prepare for your upcoming appointment, please take a few minutes to fill out our online Family History Questionnaire (FHQ). The FHQ will ask you about your personal and family history of cancer. It may help to talk with family members to gather information about their cancer diagnoses, types of cancer, ages of diagnosis etc. Once you start the questionnaire, you will be able to save it and come back later if needed. Please fill out the information the best that you can and we will review it at your appointment.

[Click here to begin your online Family History Questionnaire](#)

Cancel Previous **Send an Invite**

10. Select **Send an Invite**

New Questionnaire – Invite Existing Patient/Relative

1. Select **New Questionnaire**
2. Choose **Invite Existing Patient/ Relative**
3. Select the Questionnaire
4. Select either **Member of one family**
 - a. Search or browse for existing Pedigree
 - b. Select individuals within the pedigree

Select Individuals To Invite

<input type="checkbox"/>	First Name	Last Name	Relation	Passcode	Phone	Email	Degree
<input checked="" type="checkbox"/>	Michelle	Lind	Proband			sheenatracey@progen	Proband

History Log

Date	Status
2015-06	535 5.7.3 Authentication
2015-06	Invite Created

- c. Edit content of email
- d. Select **Send an Invite**

- 5. **Or Patients who meet specific criteria**
 - a. Select existing query format to use to search for Individuals
 - b. Select the individual
 - c. Edit content of email
 - d. Select **Send an Invite**

Relative Questionnaire – Invite New Patient

1. Select **Relative Questionnaire**
2. Choose either **Invite New Patient** or click here for instructions on [Invite Existing Patient/Relative](#)
3. Select the Questionnaire
4. Choose the folder for the patient information (Only folders that are activated for the Family History Questionnaire will display in the folder list)
5. Input the Pedigree name
6. Gender of Proband
7. Enter patient's email
8. Enter the information requested
9. Edit content of email if necessary
10. Select **Send an Invite**

Relative Questionnaire - Invite Existing Patient/Relative

1. Select Relative Questionnaire
2. Choose **Invite Existing Patient/Relative**
3. Select the Questionnaire
4. Select either **Members of one family**
 - a. Search or browse for existing Pedigree
 - b. Select individuals within the pedigree

Select Individuals To Invite

<input type="checkbox"/>	First Name	Last Name	Relation	Passcode	Phone	Email	Degree
<input checked="" type="checkbox"/>	Michelle	Lind	Proband			sheenatracey@progen	Proband

History Log

Date	Status
2015-06	535 5.7.3 Authentication
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- c. Edit content of email
- d. Select **Send an Invite**

- 5. **Or Patients who meet specific criteria**
 - a. Select existing query format to use to search for Individuals
 - b. Select the individual
 - c. Edit content of email
 - d. Select **Send an Invite**

Update Pedigree DS/ Pedigree Datasheet

1. Select **Update Pedigree DS** or **Pedigree Datasheet**
2. Search or browse for existing Pedigree
3. Select pedigree datasheet
4. Pedigree Datasheet displays

Web Dashboard Pedigree Datasheet:

Build Pedigree SS

1. Select **Build Pedigree SS**

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

- Add row to Sort pane.
- Add row to Query pane.
- Delete row from Columns

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

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

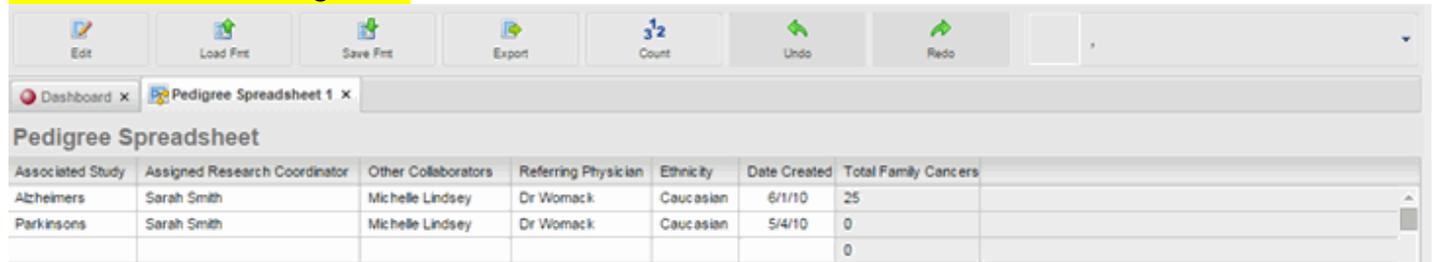
A so-called “Nuclear Option,” this button will delete all fields/rows within the selected pane.

2. Select Run and the Pedigree Spreadsheet displays (as shown below)

Run Pedigree SS

1. Select **Run Pedigree SS**
2. Search or Browse for Spreadsheet format
3. Select the **Run** button (or **Next**) for the format
4. The spreadsheet displays

Web Dashboard Run Pedigree SS:



The screenshot shows a web dashboard interface. At the top, there is a toolbar with buttons for Edit, Load Fmt, Save Fmt, Export, Count, Undo, and Redo. Below the toolbar, there are two tabs: 'Dashboard x' and 'Pedigree Spreadsheet 1 x'. The main content area is titled 'Pedigree Spreadsheet' and contains a table with the following data:

Associated Study	Assigned Research Coordinator	Other Collaborators	Referring Physician	Ethnicity	Date Created	Total Family Cancers	
Alzheimers	Sarah Smith	Michelle Lindsey	Dr Womack	Caucasian	6/1/10	25	
Parkinsons	Sarah Smith	Michelle Lindsey	Dr Womack	Caucasian	5/4/10	0	
						0	