



# **Client Workflow Interface (Dashboard) Quick Start Guide**

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 <u>blue</u>, it is a hyperlink to the topic within this document. Let's get started.

# Dashboard User

- □ Log into the Progeny Cloud Trial
- □ <u>Create a New Pedigree</u>
- □ <u>New Individual</u>
- □ <u>Review Pedigree</u>
- Default Individual Name to Global ID
- Update Individual
- Build (an Individual) Spreadsheet
- Run (an Individual) Spreadsheet
- □ <u>New Questionnaire</u>
- Update Pedigree DS (Datasheet)
- □ <u>Build Pedigree SS (Spreadsheet)</u>
- □ Run a Pedigree SS (Spreadsheet)

# 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.



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.

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Add New Pedigree		
Select a folder or accept default, and click Next		
B 👿 Web.Cloud Trial		
Cancel Previous	Next	

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

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Add New Pedigree	
What is the Name of the New Pedigree?	
Cancel Previous Next	

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



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**.

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Cancel	Previous	Next	

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.

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« Test 001	Paternal Ancestry Maternal Ancestry	Patient Info Medical History Cancer History Testing Patient Entered Data Risk Model Inputs Feedback
Pedigree Display > 2/12/16		
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SmartDraw Options		, Proband Feb 12, 2016 cloud189
		Name: First Date of Birth
		Middle Name Est Age/Age at Death
		Name: Last Date of Death
		Suffix Ourrent Age/Age at Death
		MRN Cause of Death
		Address
		City State Zip Code
		Email Address
		Phone - Preferred Cel/At Phone Number
		Ethnicity Race
		Sub race/ethnicity Race if other
		Maternal Ancestry Table Paternal Ancestry Table
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		🛃 Add Row 🗟 Copy Row 🗟 Delete Row
		Maternal Ancestry if Other Paternal Ancestry if Other 🗸 🗸
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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.

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Save	Print Show Sprea	Hide Split Datasheet Ope
Dashboard ×     Pedigree Viewe	r	
Pedigree Display	<pre>     Test_001     2/12/16 </pre>	
SmartDraw Options	Þ	

# 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.

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		Add New Individual		
	Select a Folder to add the new indi	vidual to. Click Next without selecting to accep	t user default folder	
	Web.Cloud Trial     CLOUD189			
	Cancel	Previous	Next	

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

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	Add New Individual	
	What is the Name of the New Individual?	
	John Doe	
	·	
Cancel	Previous	Next

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

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Patient ID	Relationship to Proband	Individual Last Modified Individual Modified By
,	Unknown	Feb 12, 2016 cloud189
Name: First	Date of Birt	rth
Middle Name	Est Age/Age at Deat	sth
Name: Last	Date of Deat	ath
Suffix	Current Age/Age at Deat	uth
MRN	Cause of Deat	im
Address		
City	State Zip	Zip Code
Email Address		
Phone - Preferred	Cell/Alt Phone N	Number
Ethnicity	Rac	ace
Sub race/ethnicity	Race if othe	her
Maternal Ancestry Table		Paternal Ancestry Table
Maternal Ancestry		Paternal Ancestry
🚑 Add Row 🛛 🚊 Copy I	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
		•

# **Review Pedigree**

- 1. Return to the **Dashboard** as explained earlier, then select **Review Pedigree.**
- 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.

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			Review E	xisting Pedigree		
	What is the Name	of the Exist	ing Pedigree?			Q
	Pedigree Name	Modified By	Last Modified			
	😽 Test4545	cloud189	Feb 8, 2016 1:33:48 PM			
	Test34	cloud189	Feb 8, 2016 2:25:32 PM			
	TestBug	progeny	Feb 8, 2016 5:45:41 PM			
	TestQuery	progeny	Feb 10, 2016 3:31:02 PM			
	ProgPerson2's family	progeny	Feb 10, 2016 7:12:29 PM			
	test001	cloud189	Feb 12, 2016 6:28:06 PM			
	" Test_001	cloud189	Feb 12, 2016 6:42:07 PM			
	"∰" be∨bvc	cloud189	Feb 12, 2016 7:19:37 PM			
	Cancel		P	revious	Next	

 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.

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Dashboard × Test_001	×										
edigree Viewer									R	ecently Used Datasheet Formats	¥ 🛅
~	Test_001	Paternal Ance	stry	Maternal Ancestry	Patient Info	Medical History Can	cer History Testing	Patient Entered Data	Risk Model Inputs Feedback		
Pedigree Display Pedigree Dimensions SmartDraw Options	2/12/16				Patient ID		Relationship to Proband	o Proband	Individual Last Modified Feb 12, 2016	Individual Modified By cloud 189	
			С	0-0	Na	ime: First		Date of Birth			
					Na	ame: Last		Date of Death			
						Suffix	Cum	ent Age/Age at Death			
				-0 h d		MRN		Cause of Death			
						Address					
					1 I	City	State	e Zip C	ode		
				444	Phone -	il Address Preferred		Cell/Alt Phone Num	iber		
						Ethnicity		Race			
					Sub race	retnincity		Race if other			
			000		Mate	mal Ancestry Table			Paternal Ancestry Table		
					M	aternal Ancestry			Paternal Ancestry		
					(B) A	dd Row 🍦 Copy Ro	w 🔒 Delete Row	-	🛃 Add Row 🛛 🗃 Copy Row 🔒	Delete Row	
					- Mate	mal Ancestry if Other			Paternal Ancestry if Other		

# 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))

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Individual Datasheet		1	Recently Used Datasheet For	ormats 🔻 📄
Patient Info Medical History Cancer History	Testing Patient Entered Data	Risk Model Inputs Feedback	k	
				<u> </u>
Patient ID Relat	ionship to Proband	Individual Last Modified	Individual Modified By	
, Unk	nown	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 Nur	mber		
Ethnicity	Race			
Sub race/ethnicity	Race if other			
Maternal Ancestry Table Maternal Ancestry		Paternal Ancestry Table Paternal Ancestry		
🛃 Add Row 🚔 Copy Row , 🚍 Dele	te Row	🖶 Add Row 🛛 👌 Copy Row	Delete Row	
Maternal Ancestry if Other		Paternal Ancestry if Other		
Maternal Ashkenazi Jewish Ancestry		Paternal Ashkenazi Jewish Ances	try	
				-
•				•

# Build Spreadsheet (Individual Spreadsheet)

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

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Run Load Fmt	Save Fmt			,		•
O Dashboard × New Ind Spreadshee	et ×					
Fields						
Search for Fields		Q Columns				
😑 🔜 Data Folders	Address	Type Field	Path			
System Fields	A Cell Phone/Alternate Phone Number					
😑 🚨 Individual Data Folders	A City					I III
😑 🦳 Core Fields	2 Date of Birth					
Computed Fields	Email Address					
Demographics	FHQ Consent					
🗀 Family History	A Middle Name					
🧰 Feedback	A MRN		Drag Fields From Wareh	iouse And Drop Here		
😑 🧰 Medical History	A Name: First					
🗀 Breast	A Name: Last					
Cancer	W State					
Colon	8 Zip Code					
Dermatologic						
🦲 Genetic Testing						
Deurologic al		👍 Sort (Optiona				
Reproductive		Type Field			Direction	
PHI						
Risk Model Fields						
Summary Fields			<b>Move Fields From Col</b>	umns Panel Above		
Table Fields - NO QUERY						-
Custom Fields						
Pedigree Data Folders		B Query (Option	nal)			
Core Fields		Type / Field	Onerator	Value	) AND/OR	
		Type ( Field	Operator	value	) AND/OR	
Risk Madel Fields			Move Fields From Col	umns Panel Above		
			(Or Drag Fields From Ware	enouse And Drop Here)		
Custom metus						

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.
- 洋 Deletes row from Columns pane.
- <sup>1</sup> 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 speadsheet displays

### Web Dashboard Run Spreadsheet:

Edit	Load Fire	Save F	int Exp	prt l	3 <sup>1</sup> 2 Count	4 Undo	Redo	
Dashboard ×	Cancer Histo	ry ×						
Individual S	preadshee	t						
Individual Name	First Name	Last Name	Address 1	City	Cancer His	er History.Cancer Diagnosis		
Cancer Example_1	John	Smith	3503 Miami Ave.	South Bend				
					Lymph Not	h 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 Su	bject	Prog	eny Qu	estion	naire Ir	nvitation	)												
Text	HTML																		
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	(	Cance	el						Pr	evious						Send	l an In	vite	

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

0	First Name	Last Name	Relation	Passcode	Phone	Email	Degree	History Log
2	Michelle	Lind	Proband			sheenatrac ey@progen	Proband	Date Status
								2015-06 535 5.7.3 Authentic ation 2015-06 Invite Created
1							•	(
L								

Cancel	Previous	Next

- 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

0	First Name	Last Name	Relation	Passcode	Phone	Email	Degree	Histor	y Log
	Michelle	Lind	Proband			sheenatrac ey@progen	Proband	Date	Status
-								2015-0 2015-0 2015-0 2015-0 2015-0	Status 6 535 5.7.3 Authentication 6 Invite Created
	Car	ncel			Previou	s		Ne	xt

- 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:

Dashboard x      Mary Jones pedigree     Mary Jones pedigree	K Undo	Redo	🚔 Print				,	•
<ul> <li>▲ Associated Study</li> <li>➡ Pedigree Created By</li> <li>➡ FHQ Status</li> <li>➡ trialuser</li> <li>➡ Ethnicity</li> <li>➡ Pedigree name</li> <li>➡ FHQ Completed Date</li> <li>➡ Total Family Cancers</li> <li>➡ Modified By</li> </ul>	Dashboard ×     Pedigree Dat     Tab1 Tab2 Tab3	Mary Jones pedigi asheet	ree ×				Recently Used Datasheet Formats	•
U FHQ Last Invite Sent Date	Associated Stuce     Ethnicity     Date Created	ly	Pedigree Created trialuser Pedigree name Mary Jones pedigree Modified By	i By	FHQ Status FHQ Completed Date FHQ Last Invite Sent Date	Total Family Cancers 0		Î

### **Build Pedigree SS**

<ol> <li>Select Build Pedigree SS</li> </ol>	Sea
Use the Fields pane to search or	Fol
browse for fields to drag into	P.
columns, sort or query panes	
$\rightarrow$	

- 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.
- X Delete row from Columns
- Move the selected field/row up one position in the order
- Fields Columns arch for Fields 0. Field Name Associated Study 1 Fields in folder 'Pedi ders Assigned Research Coordinator 2 Pedigree Data Fields Assigned Research Q A Other Collaborators 3 🛒 System Fields Associated Study Pedgree Info A Referring Physician Date Created 4 Summary Fields Ethnicity Ethnicity 5 A Other Collaborators 6 Date Created A Referring Physician 7 Total Family Cancers 24 🖪 🗶 Sort Field Na Query Operato Value 41 🐣 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)

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### **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:

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Dashboard ×	Pedigree Spreadshee	t1 ×									
Pedigree Sp	preadsheet										
Associated Study	Assigned Research Coord	inator	Other Collab	orators	Referring	Physic ian	Ethnicity	Date Created	Total Family Cancers		
Alzheimers	Sarah Smith		Michelle Lind	lsey	Dr Woma	ck	Caucasian	6/1/10	25		<u>^</u>
Parkinsons	Sarah Smith		Michelle Lind	isey	Dr Woma	ck	Caucasian	5/4/10	0		
									0		