



## Progeny 9 Web User Quick Start Guide



# Progeny 9 Web Quick Start Guide

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This Quick Start Guide introduces the basic functions and tasks available in Progeny 9 Web. The Table of Contents below are hyperlinked to their respective sections within this guide.

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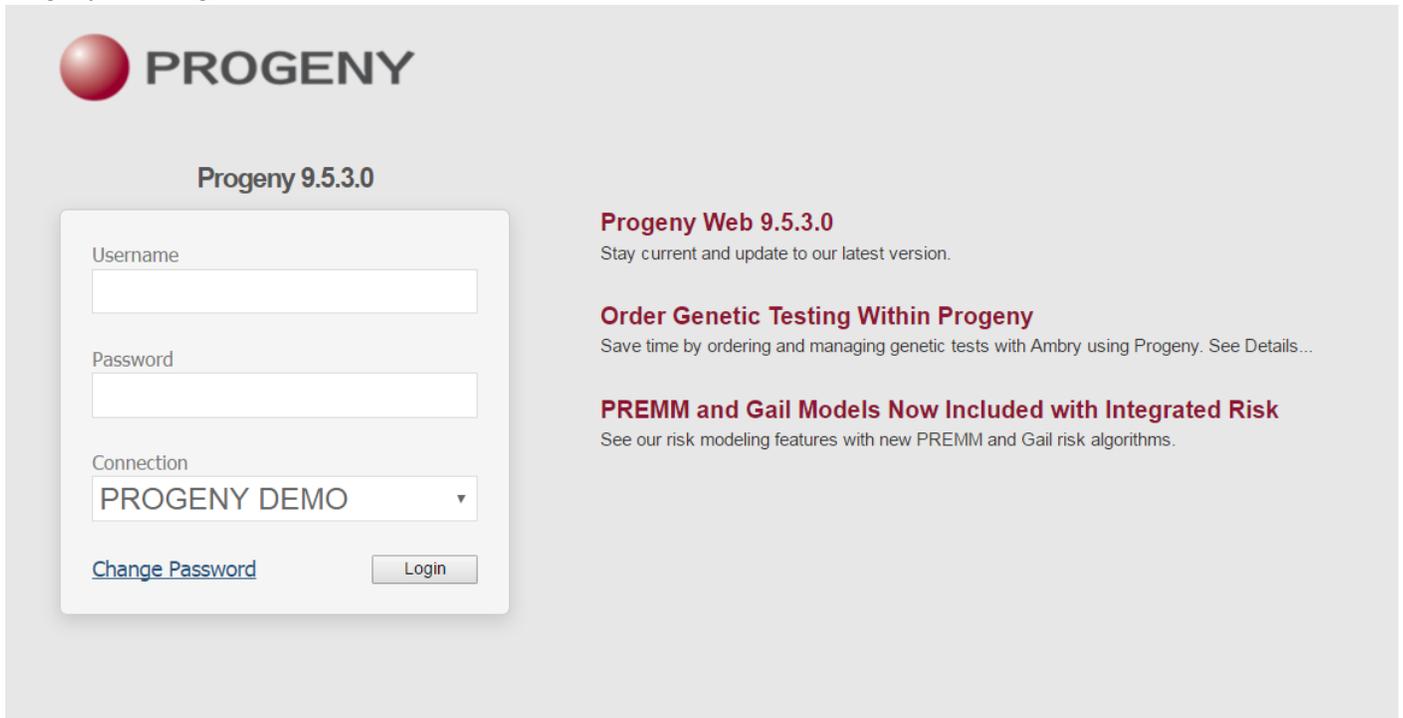
- Logging Into Progeny Web

Progeny Web is accessible through supported web browsers.

Web Browser Requirements		
Compatible Browsers	Not Supported	Optimal Viewing
Google Chrome		1024 X 768 minimum screen resolution
Mozilla Firefox		Recommend browsers with full HTML-5 compatibility
Internet Explorer Version 9 or newer	Internet Explorer Versions 6-8	(Chrome, Firefox, Internet Explorer Version 10)
Apple Safari	Apple Safari for Windows	

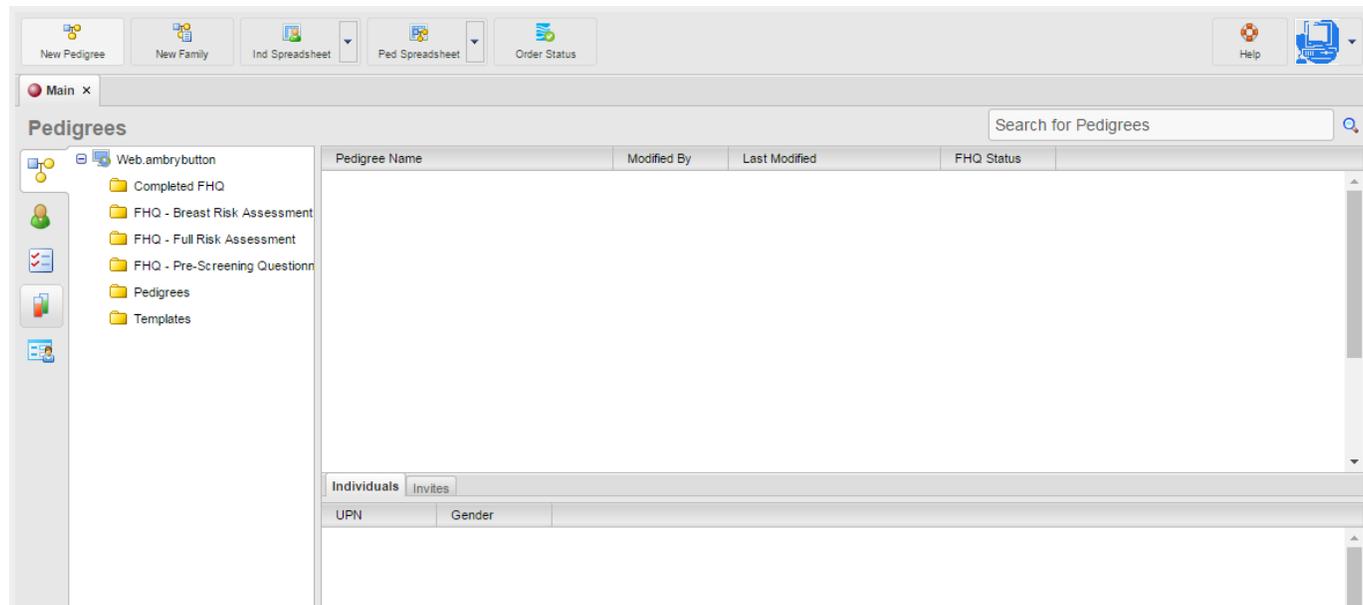
Use the URL provided by your local Progeny Administrator to access the Progeny Web Client login screen, then login using your assigned credentials.

*Progeny Web Login Screen:*

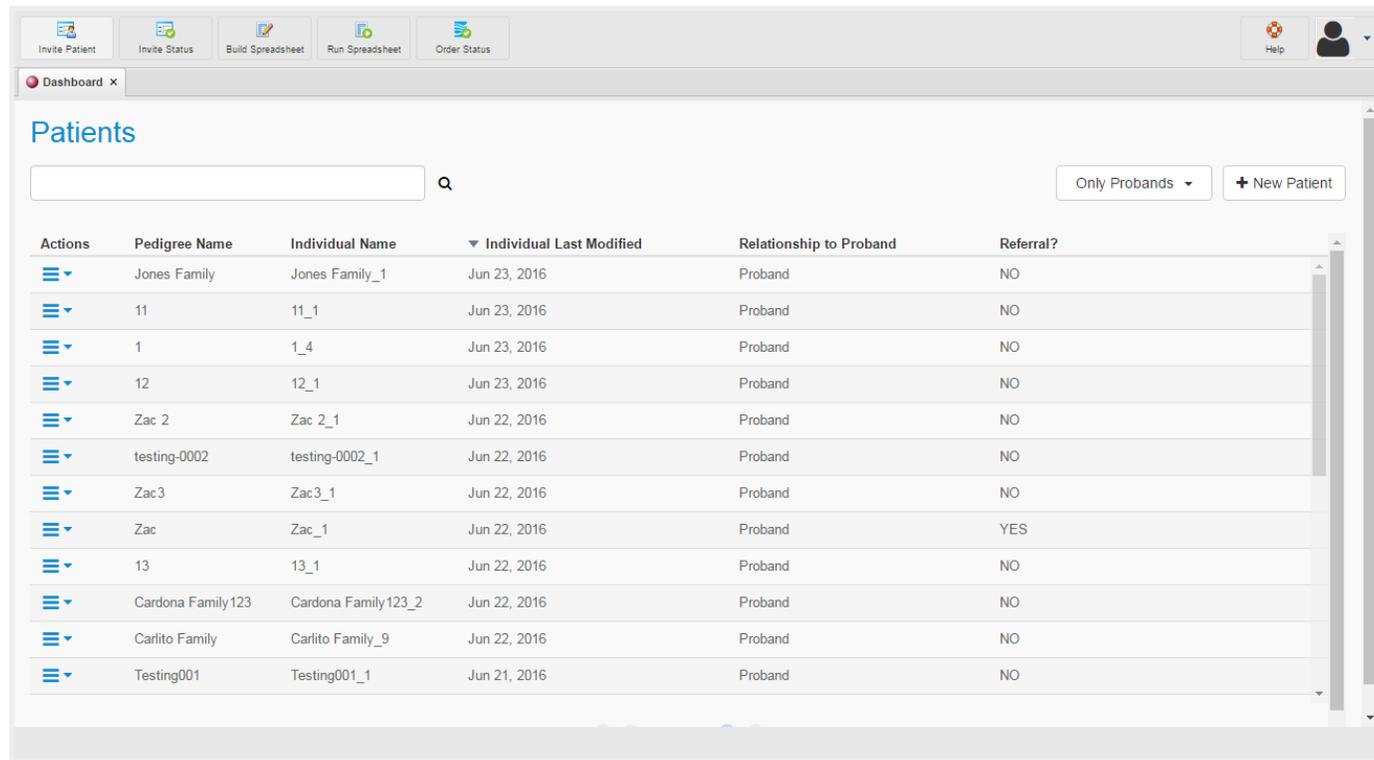


Progeny has three different screens you can log in to: The *Full Client* screen, the *Patients* screen, and the *Dashboard* screen. Depending on your particular work flow they may make performing your tasks more efficient and streamlined. This manual focuses on the Full Client screen as it has access to the most functions of the three. The Dashboard and Patients screens are referenced briefly in the [Alternate Starting Screens](#) section below.

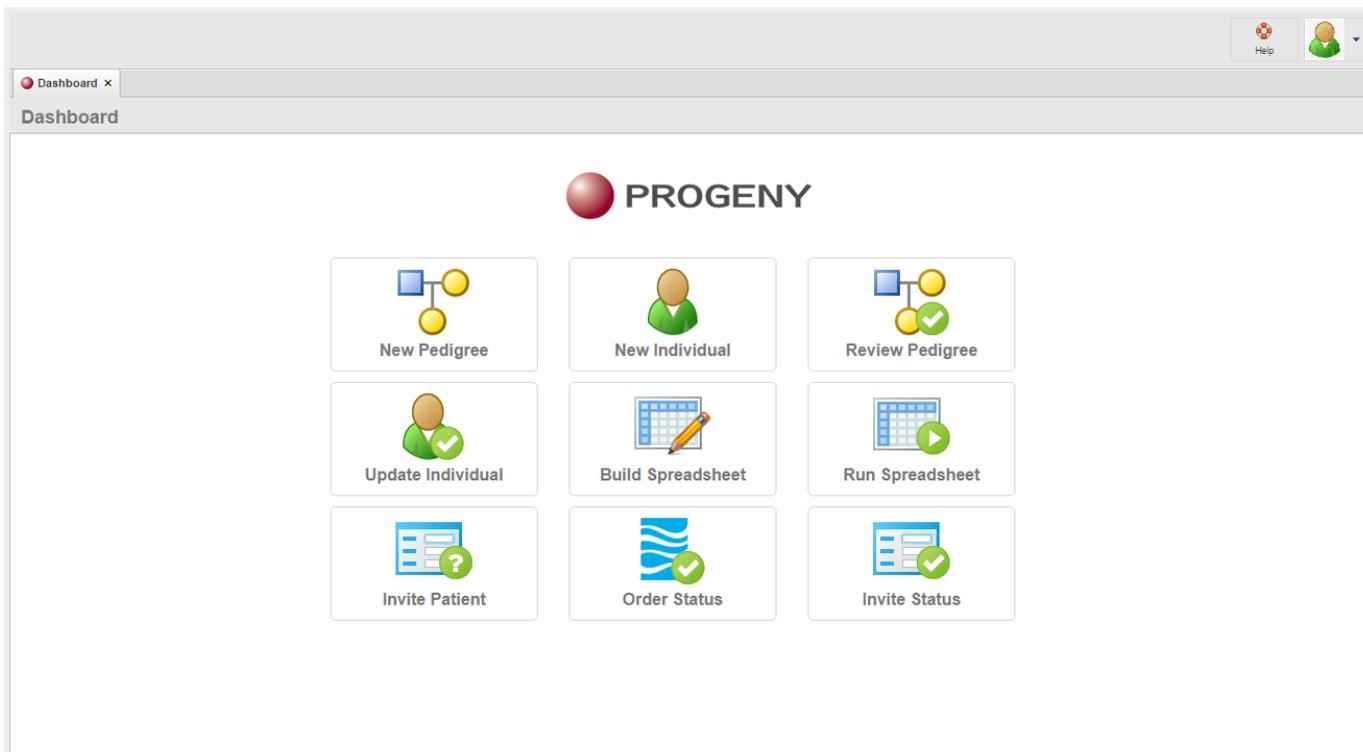
### The Full Client Screen:



### The Patients Screen:



The Dashboard Screen:



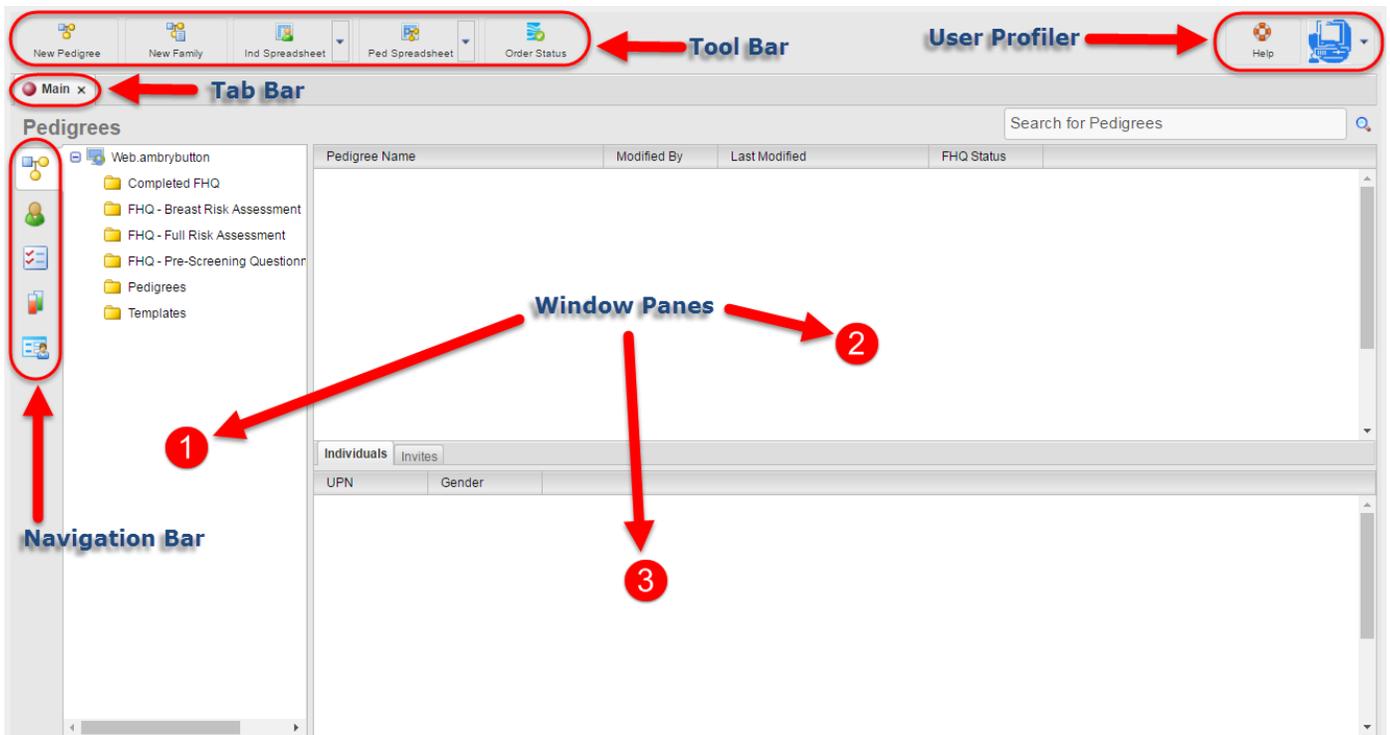
## - Using Progeny

Progeny has two different clients for accessing your database file: the *Desktop Client* (or Fat Client), and the *Web Client*. The main difference between the two is that the Desktop Client can create and manage Progeny users, fields, datasheets and some other elements. These are mainly administrative tasks that must be performed using the Desktop Client. However, both clients can manage your clinical data input, update, retrieval, and deletion.

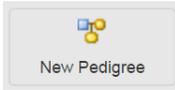
The Progeny application provides multiple ways of accessing the same functions. If an option is available from the toolbar as well as other areas (for example, the main menu or a context menu), then this manual references the toolbar. Although this manual does not address all the multiple ways of accessing the same function, you can use whichever method best suits your working needs.

- Main Window (Full Client) – Once you log into Progeny you are taken to the main window. The next section describes its layout and some of the available options.

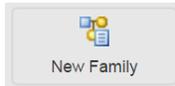
### o The Main Window Layout



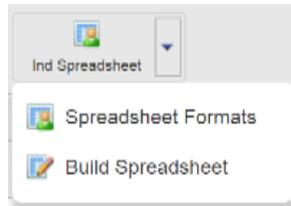
- Tool Bar – The tool bar is located at the top left of the window as a row of icons, some with drop-down options. The tool bar provides quick access to all the available functions for a selected product feature. The tool bar is dynamically updated based on the window that is open. These are the tool bar options available from the main window.



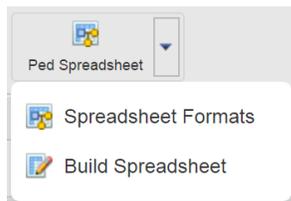
- New Pedigree – allows you to create a new pedigree, name it, and select which folder you would like to place it in.



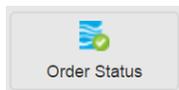
- New Family – allows you to create a pedigree and specify how many immediate family members the proband has, then builds a pedigree accordingly.



- Ind Spreadsheet (Individual Spreadsheet) - has a dropdown arrow where you can select **Spreadsheet Formats** or **Build Spreadsheet**. **Spreadsheet Formats** takes you to a screen which has your saved *individual* spreadsheet formats. Here you can run or edit them. The **Build Spreadsheet** option takes you to a screen which allows you to build and run a custom query using *individual* level fields and system fields.



- Ped Spreadsheet (Pedigree Spreadsheet) - has a dropdown arrow where you can select **Spreadsheet Formats** or **Build Spreadsheet**. **Spreadsheet Formats** takes you to a screen which has your saved *pedigree* spreadsheet formats. Here you can run or edit them. The **Build Spreadsheet** option takes you to a screen which allows you to build and run a custom query using *pedigree* level fields and system fields.

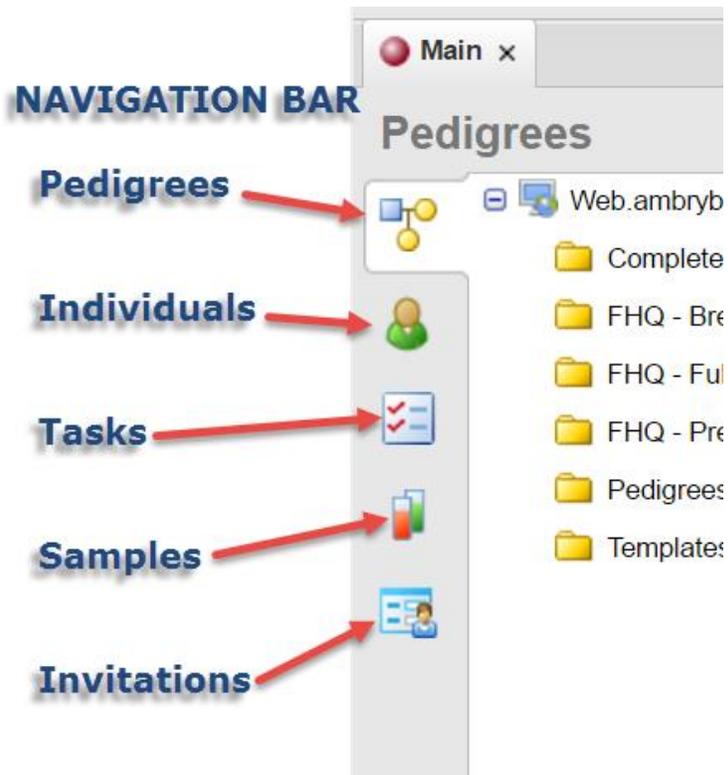


- Order Status – opens a new tab showing a list of genetic tests ordered, their status, and a link to the test results report. For more information see the [Order Status](#) section below

- Tab Bar – Pedigrees, datasheets, spreadsheets, tables, and lookup tables open as separate tabs just below the toolbar in the main window. You can switch between each by clicking the tab you desire. To close a tab, right-click on the tab and select **Close** or click the “x” at the right of each tab.



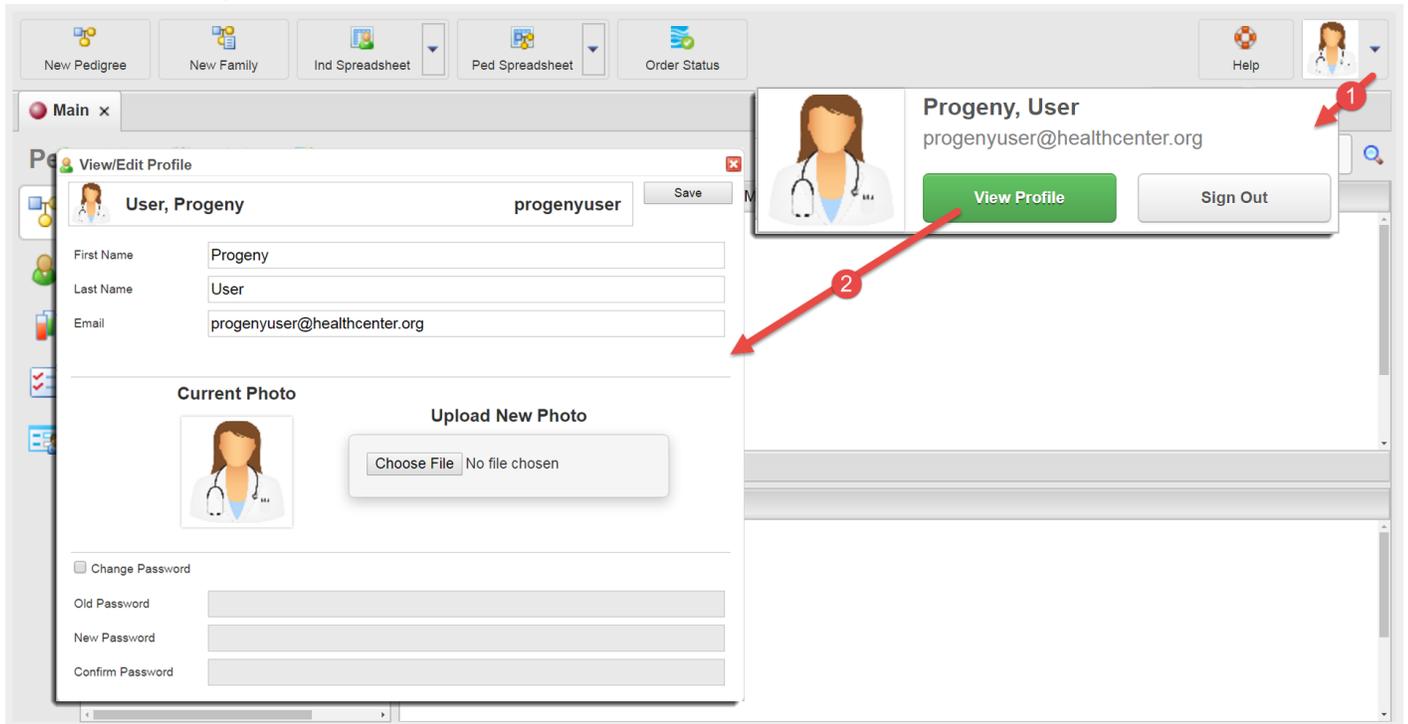
- Navigation Bar (Modules) – The navigation bar is the vertical bar displayed on the left side of the main window. Use the navigation buttons access the other modules in Progeny: **Pedigrees** module, **Individuals** module, **Tasks** module, **Samples** module, and **Invitations** module



- Window Panes - The Progeny main window has three window panes. The left vertical pane displays the folder organization for a particular functional area in classic Windows Explorer-style structures. Click on a folder in the pane to open the folder. As folders and sub-folders are opened in this pane, detailed information about the selected folder’s content is displayed in the upper right pane. When an item is selected in the upper right pane its information is displayed in the lower right pane.

- User Profile – Users of Progeny Web can manage their basic user profile. On the upper right side of the tool bar click the drop down arrow next to the avatar then select the View Profile button to open the View/Edit Profile window. Here users can edit their profile name, email address, photo, and password.

*View/Edit User Profile screen:*



- Dynamic Menus – Progeny’s tool bar menu options change making available different options depending on which part of the software you are in. Below are some different tool bars that appear depending on the module you are in.

*Pedigrees Module Tool Bar Options:*

Pedigree Name	Modified By	Last Modified
Cardona Family123	zaceaton1	Jun 22, 2016 10:0
Cardona1011 Family	progeny	Jun 24, 2016 11:2
Cardona1025 Familv	broaenv	Jun 15, 2016 11:2

*Individuals Module Tool Bar Options:*

*Invites Module Tool Bar Options:*

Invite Status	Invited By
<input type="checkbox"/> Invite Created	<input type="checkbox"/> progeny
<input type="checkbox"/> Invite Sent	<input type="checkbox"/> DemoUser
<input type="checkbox"/> Questionnaire Started	<input type="checkbox"/> Generic Link
<input type="checkbox"/> Questionnaire Partially Completed	
<input type="checkbox"/> Questionnaire Completed	
<input type="checkbox"/> Invite Declined	
<input type="checkbox"/> Reminder Sent	

- Smart Lists - When data is collected for an individual, pedigree, and so on, there are typically multiple fields in which to enter the data. For example, when collecting data for an individual the fields can include First Name, Last Name, Address 1, Address 2, City, State, Zip, Race, DOB, Current Age, Height, Weight, etc. When trying to quickly locate a specific individual, pedigree, etc. in a data folder, it is simply not feasible to display all the fields. Instead, the user can customize the fields that are displayed by using Progeny's Smart List feature. A smart list displays only selected fields from all the available data fields and system fields for individuals, pedigrees, and samples. Smart lists are displayed in the right panes of the Progeny main window. Multiple smart lists are available for individuals, pedigrees, and samples. A smart list can be saved on per user basis so that each user can have his/her own preferred view, or the Progeny administrator can set a single default view for all users. After the Progeny Administrator creates the smart lists for individuals, pedigrees, etc., a contextual search can be carried out. A contextual search searches only the data that is displayed in the columns in a smart list. This provides a convenient method for quickly retrieving needed data.

*Smart Lists options:*

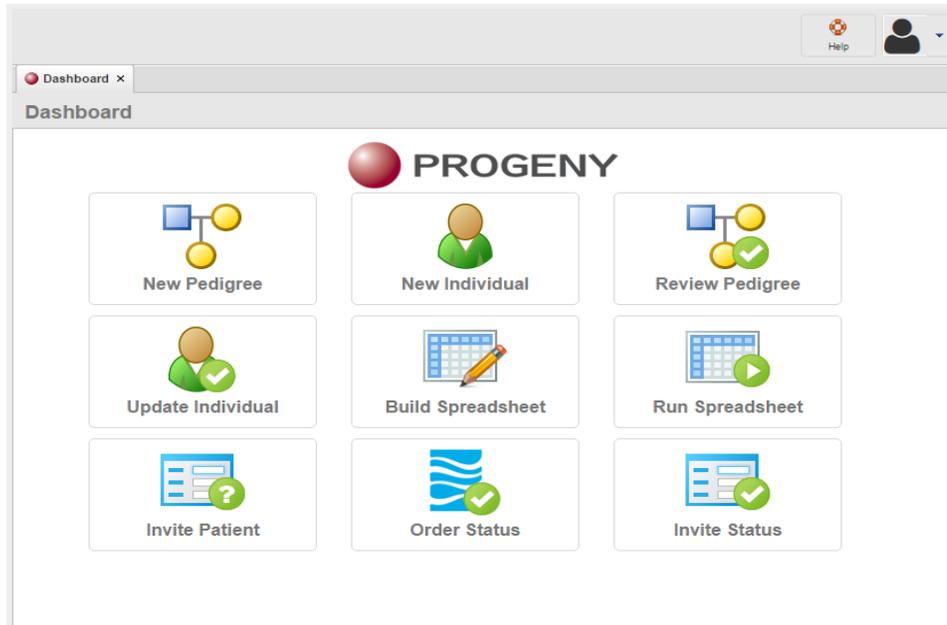
**right click a column heading to reveal the Smart List's options**

Pedigree Name	Progeny ID	Last Modified	FHQ Status
<a href="#">Cardona Family 123</a>		Jun 22, 2016 10:06:28 AM	Complete
<a href="#">Cardona1011 Family</a>		Jun 24, 2016 11:28:07 AM	Complete
<a href="#">Cardona1025 Family</a>		Jun 15, 2016 11:25:38 AM	Complete
<a href="#">Carlito Family</a>		Jun 22, 2016 9:03:07 AM	Complete
<a href="#">ecardonatestest123's family</a>		Jun 10, 2016 4:59:36 PM	Complete
<a href="#">humberto123's family</a>		May 31, 2016 10:39:48 AM	Complete
<a href="#">Jones Family</a>		Jun 23, 2016 4:51:09 PM	
<a href="#">Smith Family</a>	progeny	May 20, 2016 6:07:03 PM	Invite sent
<a href="#">Smith Family 787</a>	progeny	Jun 8, 2016 10:32:29 AM	Complete
<a href="#">Smith Family 78</a>	progeny	Jun 1, 2016 5:08:52 PM	Complete

- Alternate Starting Screens – Progeny has two additional screens available after logging in to the software. Depending on the user’s workflow the alternative screens may prove to increase productivity by showing only the options for the user’s specific workflow.

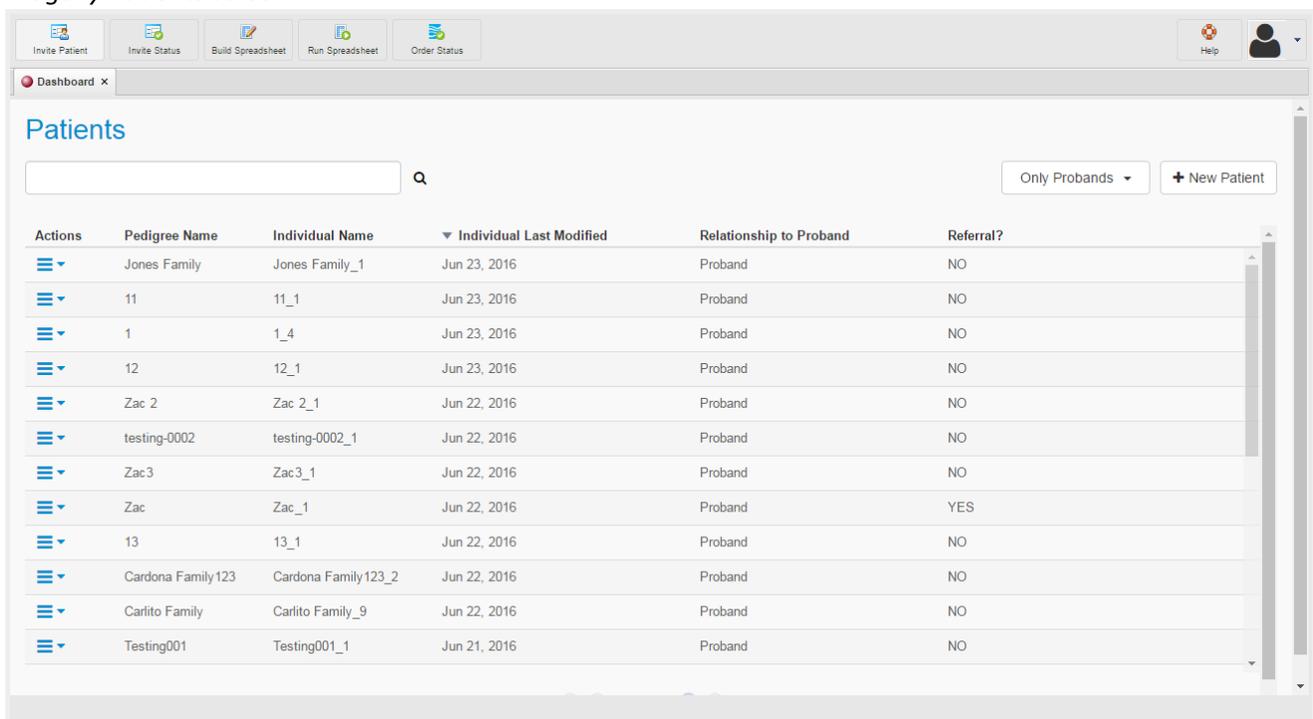
- o Dashboard Screen – Some or all of the below options are available via the Dashboard screen.

*Progeny Dashboard screen:*



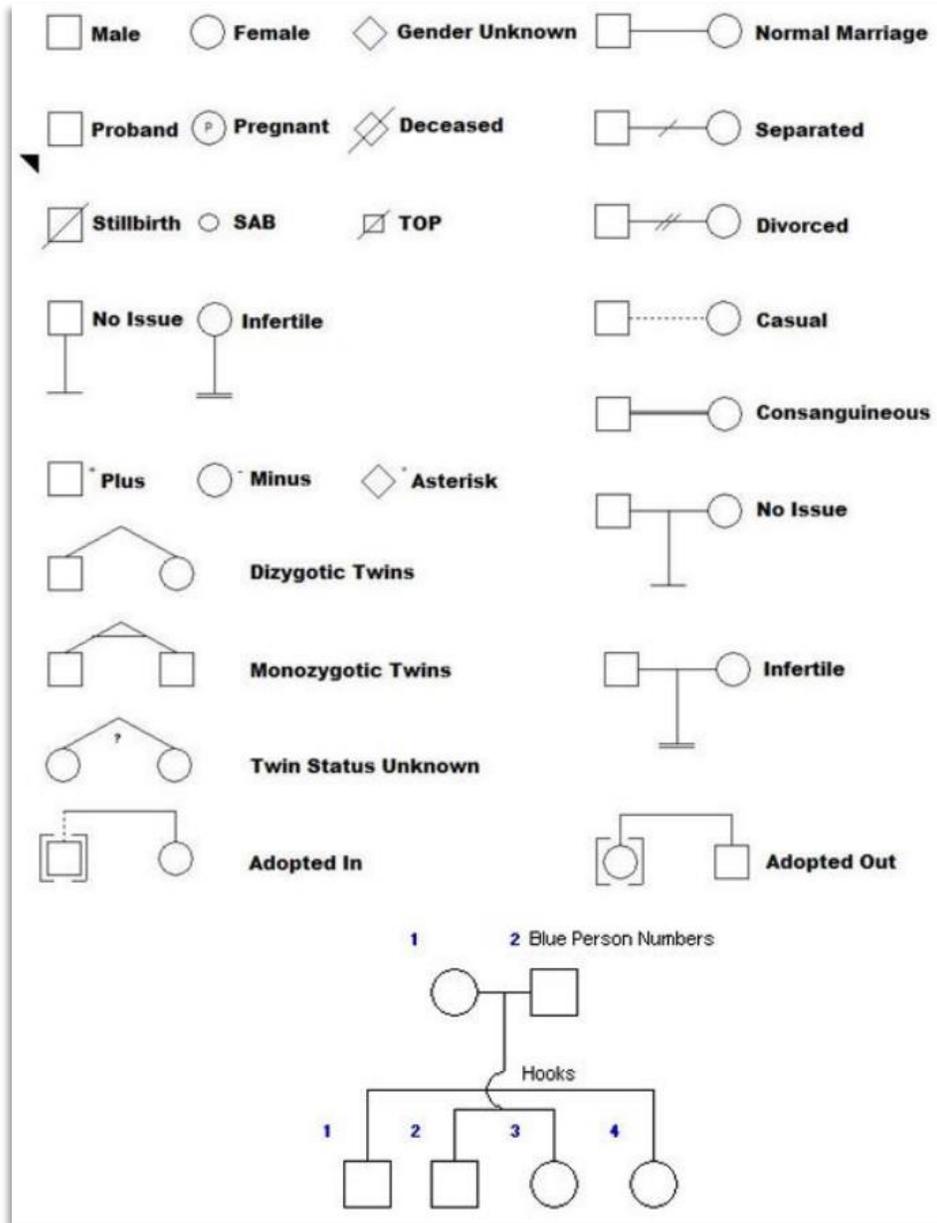
- o Patients Screen – This screen focuses on managing pedigrees, individuals, and invitations.

*Progeny Patients screen:*



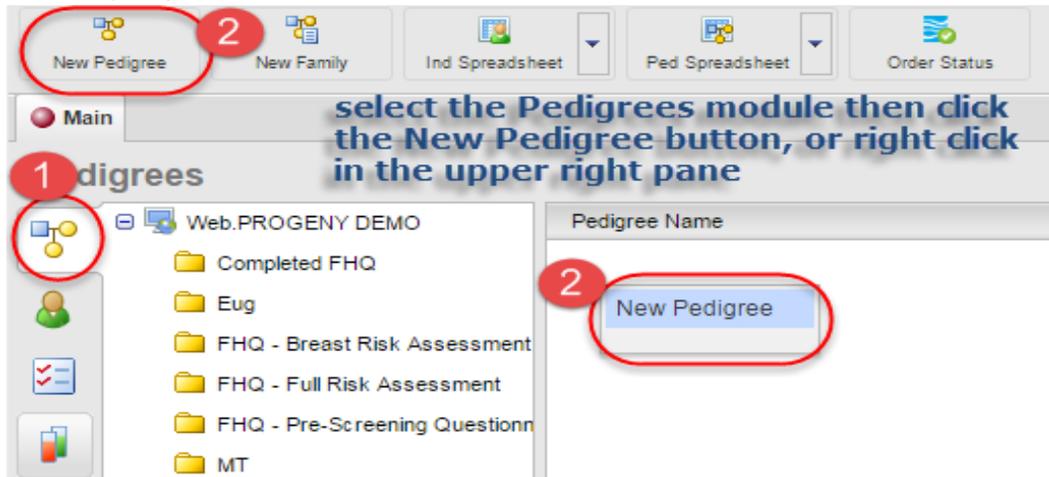
- Pedigrees - A pedigree, also known as a genogram, is a diagram that depicts individuals who are related by blood or another factor. Different icons represent different types of individuals. For example, a square icon indicates a male individual, a circle icon indicates a female individual, and a diamond icon indicates an individual of unknown/undetermined gender. Although there are no definitive standards when drawing pedigrees, there are published guidelines for the human genetics market. Progeny uses pedigree icons based on the guidelines published in the American Journal of Human Genetics (1995) Bennet, et al.

Icons used on pedigrees drawn in Progeny:



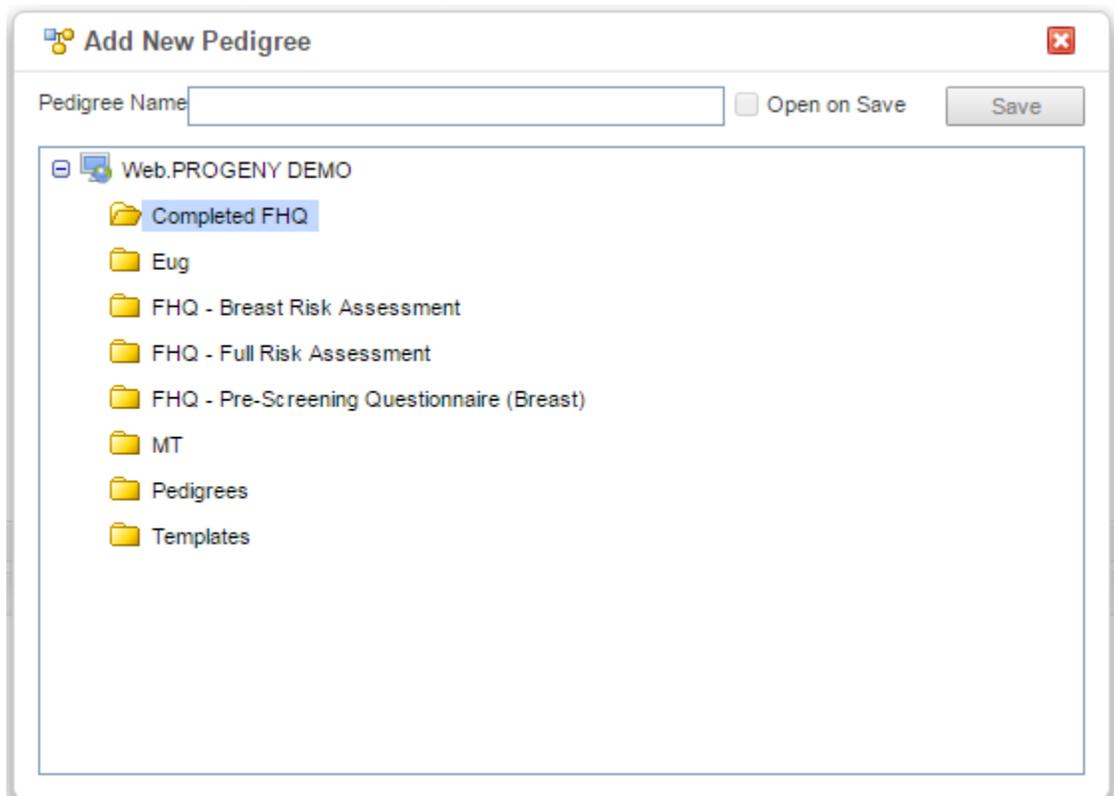
- Creating Pedigrees – After clicking the Pedigrees module on the navigation bar you can create a pedigree by clicking the New Pedigree button on the Main tab, or by right clicking in the upper right pane of the Main tab and selecting New Pedigree.

*Create a pedigree:*



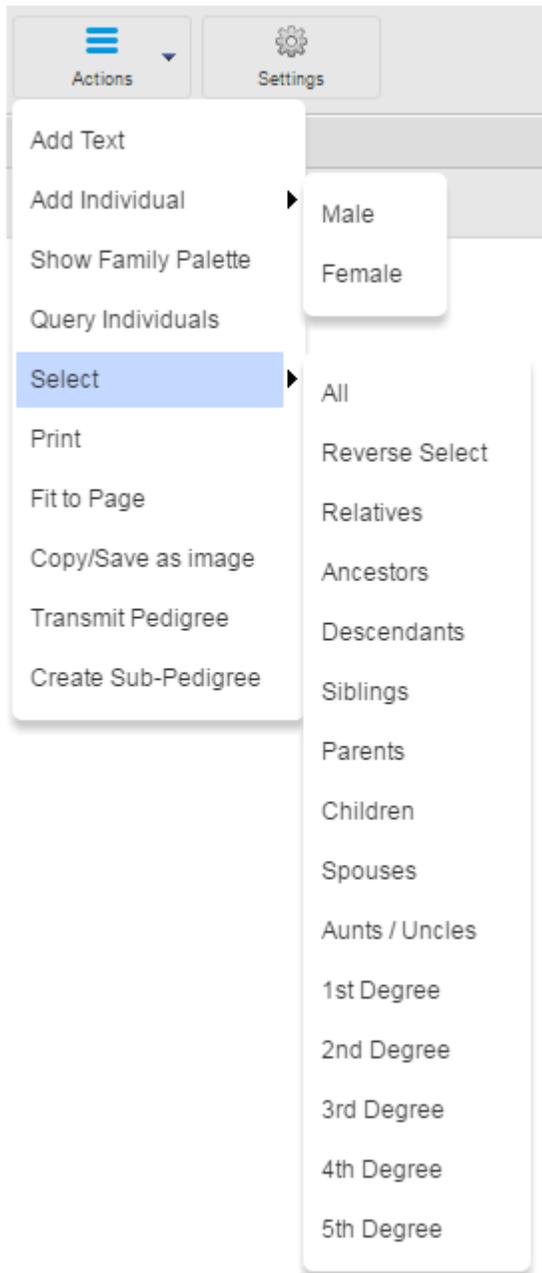
You are then prompted to name the pedigree and select a folder in which to save it.

*Name the new pedigree and select a folder to save it in:*



The pedigree can be edited by using the options available from the **Actions** button of the pedigree tool bar as shown below.

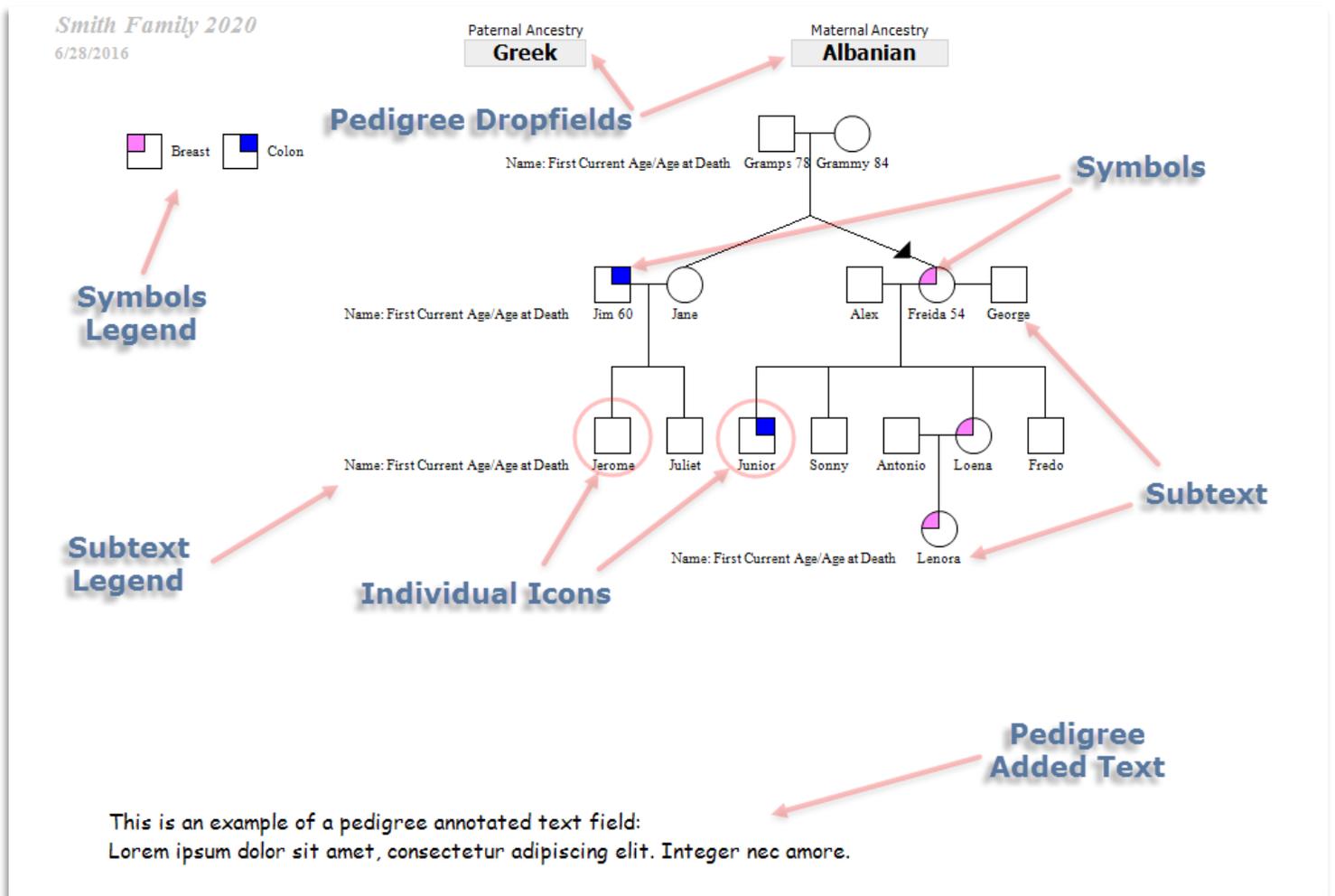
*Options available on the Actions button from the Pedigrees module tool bar:*



There are several elements on a pedigree that are used to display information. Here they are with descriptions

- Individual Icons – The Individual Icon represents one individual on the pedigree. This icon will be a square for males, a circle for females, and a diamond for undetermined gender. These icons can contain several colors and shapes to represent a medical condition.
- Pedigree Symbols - Symbols are applied to icons to graphically represent data about the individual, such as individuals with a cancer diagnosis that equals Breast. A Symbols Legend identifies each symbol.
- Pedigree Subtext - The icon subtext, which is the text that is displayed above or below an individual icon on a pedigree, is specific for the individual. A Subtext Legend can be shown to the left of each generational line on a pedigree to identify specifically what the subtext information is.
- Pedigree Text Boxes – You can add a text box to individual pedigrees for customized text. Just select Add Text from the pedigree’s Actions dropdown menu and place the text field on the canvas. You may adjust the font type and size by right clicking the new text box, or resize it by grabbing its corners or edges. Reposition it by dragging the 4-way arrow cursor that appears when your mouse is over the text box.
- Pedigree Dropfields – Pedigree Dropfields are used for placing the same field on multiple pedigree canvases. You can add fields to a pedigree canvas, save the added fields as a format, then apply the format to some or all pedigrees in a folder.

Example of Pedigree Canvas Elements:



- Modifying Pedigrees – There are three ways to add individuals to a pedigree as shown below.
  - 1) Right click an individual on the pedigree to show a relation menu then select the relation you would like to add.
  - 2) After selecting an individual on the pedigree canvas the individual's icon will show yellow arrows around it and black dots in a yellow square. The yellow arrows are used to add an individual of a particular relationship dependent upon the arrow chosen, and a gender dependent upon whether the arrow is left or right clicked. The dots are used to join two existing individuals in a relationship dependent upon the dot chosen.
  - 3) Click on the Actions icon on the Pedigree Tool Bar and select Show Family Palette. On the Family Palette select the relation you would like to add then click the individual you would like to add the relation to.

### 3 ways to add individuals to a pedigree:

**1** right click an individual to show these options and add a relative

**2** - left or right click yellow arrows to add relatives  
- drag black dots in the yellow square onto other individuals to create relationships

**3** select the relationship on the Family Palette then click an individual on the pedigree to add the selected relative

By clicking the Settings icon on the pedigree module's tool bar you can select which elements are shown on a pedigree, modify how they are displayed, and specify how the Smartdraw feature works.

### Modifying what elements are shown on a pedigree:

**Pedigree Settings**

**Pedigree Display**

- Show Grid
- Snap To Grid
- Show Page Breaks
- Show Header
- Show Footer
- Show Symbols Legend
- Show Subtext Legend
- One Click Add
- Auto Draw
- Show Haplotypes
- Show Invite Status
- Show Linkage Settings
- Use Hooks
- Show Blue ID #
- Show Date

Proband Arrow Position: Upper Left

Icon Subtext Font: Times New Roman, 8

Header: Smith Family 2020

Footer:

Close

Modifying how the individual icons, relationship lines, and grid lines show on a pedigree:

**Pedigree Settings** [Close]

- Pedigree Display
- Pedigree Dimensions**
- Smartdraw Options
- Formats

Line Width: 1

Scale: 100

Icon Size: 27

Sibling Line Height: 39

Y-Subtext Spacing: 29

Individual Space: 55 x 115

Grid Space: 7 x 27

[Close]

Selecting which Smartdraw Options you would like enabled:

**Pedigree Settings** [Close]

- Pedigree Display
- Pedigree Dimensions
- Smartdraw Options**
- Formats

- Keep Spouses Together
- Line Up Generations
- Conserve Left Space
- Force Father Left
- Redraw Pedigree

[Close]

- Split Spreadsheets and Split Datasheets - To view a spreadsheet or datasheet while viewing a pedigree click the Show Datasheet icon on the Pedigree tool bar, then choose either the Show Spreadsheet or the Show Datasheet option. The screen splits in two showing the pedigree on the left and the spreadsheet or datasheet on the right.

*Show Spreadsheet Split Screen:*

The screenshot shows the software interface with a split screen. On the left is a pedigree chart for the 'Smith Fan' family, dated 6/29/16. The pedigree includes individuals like Gramps (78), Grammy (84), Jim (60), Jane, Alex, and Freida (54). On the right is a spreadsheet with the following data:

Name: First	Name: Last	Current Age/Age at Death	Maternal Ancestry	Paternal Ancestry	Cancer History: Car	Cancer History: B
Freida		54	Albanian	Greek	Breast	
Gramps		78	Albanian	Greek		
Grammy		84	Albanian	Greek		
Junior			Albanian	Greek	Colon	
Sonny			Albanian	Greek		
Loena			Albanian	Greek		
Fredo			Albanian	Greek	Breast	
Antonio			Albanian	Greek		
Lenora			Albanian	Greek		
Alex			Albanian	Greek		
George			Albanian	Greek		
Jane			Albanian	Greek		
Jim		60	Albanian	Greek		
Jerome			Albanian	Greek		
Juliet			Albanian	Greek		
Loena					Breast	
Loena						Colon

*Show Datasheet Split Screen:*

The screenshot shows the software interface with a split screen. On the left is the same pedigree chart as in the previous image. On the right is a patient information form for Freida. The form includes the following fields:

- Patient ID: F
- Relationship to Proband: Proband
- Individual Last Modified: Jun 29, 2016
- Individual Modified By: progeny
- Name: First: Freida
- Middle Name: (empty)
- Name: Last: (empty)
- Suffix: (empty)
- MRN: (empty)
- Date of Birth: (empty)
- Est Age/Age at Death: 54
- Date of Death: (empty)
- Current Age/Age at Death: 54
- Cause of Death: (empty)
- Address: (empty)
- City: (empty)
- State: (empty)
- Zip Code: (empty)
- Email Address: (empty)
- Phone - Preferred: (empty)
- Cell/Alt Phone Number: (empty)
- Ethnicity: (empty)
- Race: (empty)
- Sub race/ethnicity: (empty)
- Race if other: (empty)
- Maternal Ancestry Table: Albanian
- Paternal Ancestry Table: Greek

- Copying and Moving Pedigrees - Pedigrees can be copied or moved between Pedigree folders. For either of these actions, the following are important points to note:
  - Copying a pedigree leaves the original pedigree in its original data folder while putting a copy (or duplicate) of the pedigree in the new destination folder. Any edits made to the copied pedigree are not reflected in the original pedigree.
  - Moving a pedigree removes the pedigree from its original data folder and places the pedigree in a new destination folder. A copy of the original pedigree is not made.
- Deleting Pedigrees - Deleting a pedigree is a permanent event. A deleted pedigree cannot be recovered from the database.

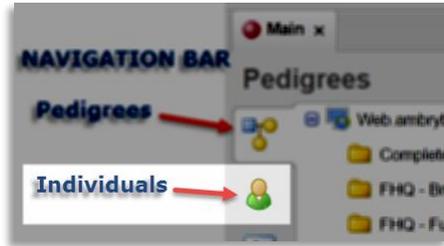
To delete a pedigree follow these steps:

  - 1) On the Progeny main window navigation bar, click the Pedigrees button to open the Pedigrees window. Choose the Pedigree folder that contains the pedigree(s) to be deleted.
  - 2) Right-click the Pedigree being deleted and on the context menu that opens click "Delete Pedigree".
  - 3) A delete confirmation window appears. Click Yes. The selected pedigree is deleted and the user returns to the Pedigrees window.

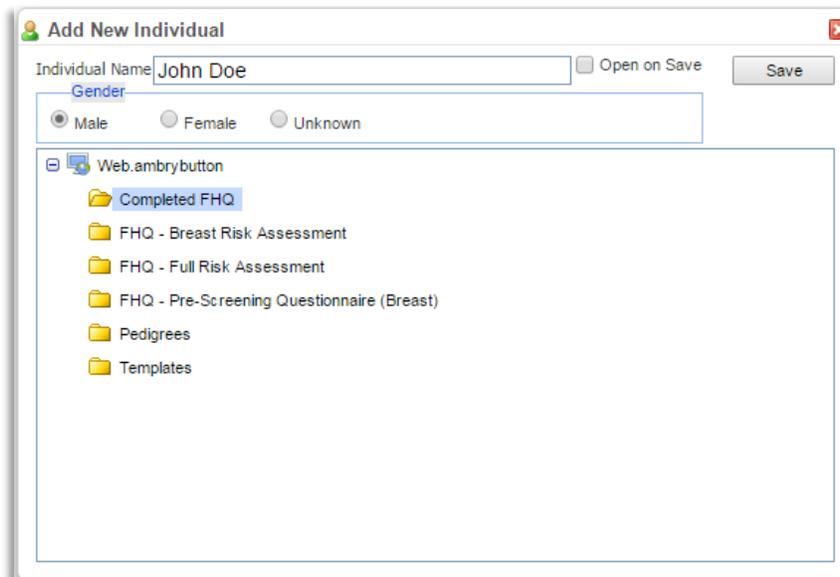
- **Individuals** – To add individuals to your database without attaching them to a pedigree, select the Individuals module from the Navigation Bar. An individual who is not contained in a pedigree is referred to as a singlet. After creating a singlet, the singlet can be moved to an existing pedigree or to a new pedigree.

- o **Creating Individuals**

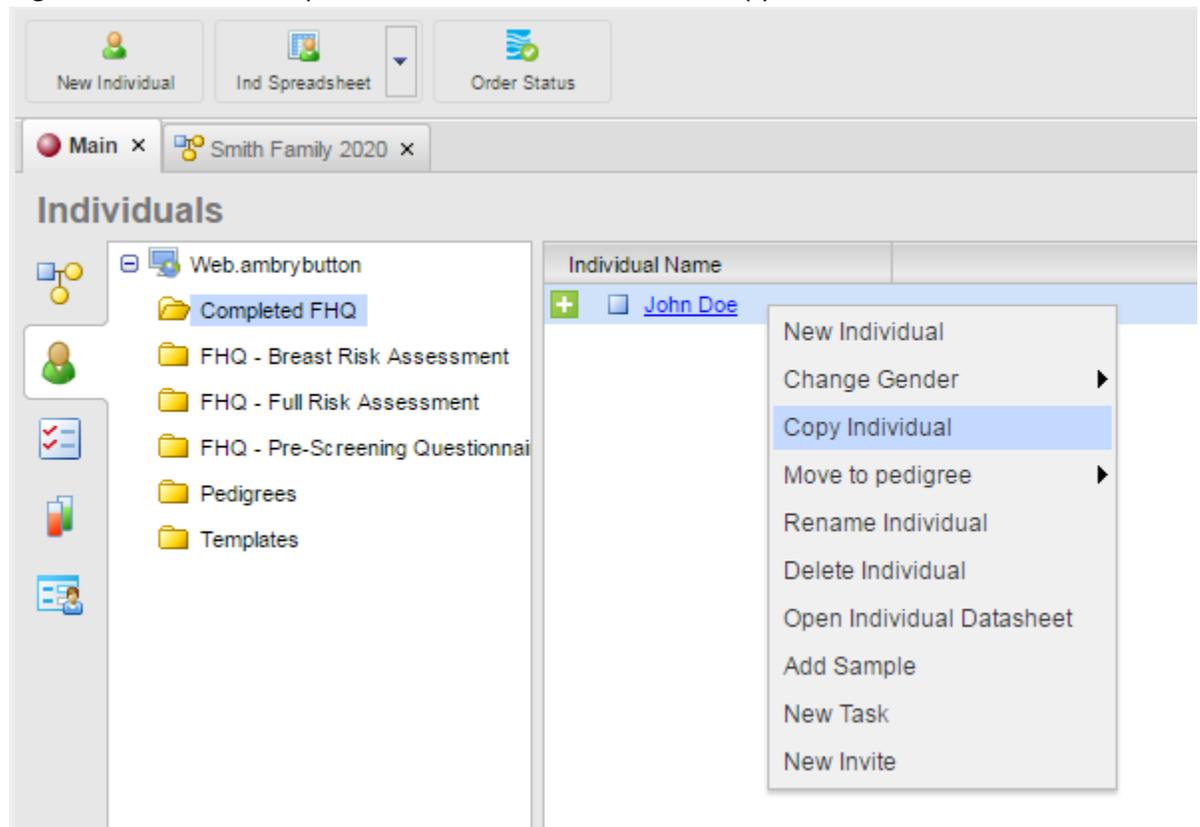
- 1) On the Progeny main window navigation bar, click the Individuals button



- 2) On the Individuals window, click the New Individual tool bar button. The Add New Individual dialogue box opens. Enter the name for the new individual, select the gender for the individual, then select the data folder to which the individual is being added. A message indicates the individual was successfully created.



- Copying and Moving Individuals - Users can copy an individual between data folders, and can move an individual between data folders. For any of these actions, the following are important points to note:
    - Copying an individual leaves the original individual in its original data folder while putting a copy (or duplicate) of the individual in the new destination folder. Any edits made to the copied individual are not reflected in the original individual.
    - Moving an individual removes the individual from its original data folder and places the individual in a new destination folder. A copy of the original individual is not made.
- 1) To copy or move an individual click the Individuals button on the Progeny main window navigation bar.
  - 2) Right click the individual you would like to move and select Copy Individual.



- 3) Type in a new name for the individual then select a folder you would like the individual copied into. A message indicates the individual was successfully copied.
- Deleting Individuals
    - 1) Right click the individual you would like to move and select Delete Individual.
    - 2) A message appears asking if you're sure you wish to delete the selected individual. Click Yes. The individual is deleted.

- Individual Datasheets - The individual datasheet is used to enter and store information about individuals in the Progeny database. An Individual datasheet can contain individual database fields, pedigree database fields, and marker database fields. Datasheets are built from within the Progeny Desktop (Fat) client then saved as a format (similar to a template). This format can now be applied to other individuals or folders within Progeny.

- o Applying Individual Datasheet Formats – Click an individual in the Individuals module or double click an individual on a pedigree. The datasheet opens up. In the upper right corner of that window is an icon named Select a New Datasheet Format by its mouse-over label, as shown below. Select the containing folder then the desired format. Once selected the individual datasheet opens up this format.

**1 select the New Datasheet Format icon**

**2 navigate to the folder which contains the desired Datasheet Format then select the format.**

The screenshot shows the 'Individual Datasheet' window for 'Johan Doe'. The interface includes a top toolbar with 'Undo', 'Redo', 'Print', and 'Order Test' buttons. Below the toolbar is a tabbed interface with 'Patient Info' selected. The main area contains various input fields for patient information, including name, date of birth, address, and ethnicity. At the bottom, there are two 'Ancestry Table' sections with 'Add Row', 'Copy Row', and 'Delete Row' buttons. A file explorer window is overlaid on the right side, showing a tree view of 'Datasheet Format Folders' with 'Questionnaire Formats' selected. A list of formats is visible on the right, including 'Pre-Screening (Breast)', 'Breast Risk Assessment', 'Full Risk Assessment', 'Profile', 'FHQ Email Invitation', 'Relative Template', and 'Terms of use'.

- **Fields** - Progeny Web client does not allow users to create, modify or delete database fields. This section will cover database fields and functions but keep in mind configuring fields is an administrator function that must be managed in the Progeny Desktop client by a Progeny administrator. When an administrator creates a database field in the Progeny Desktop Client a field type is specified. The field type determines the type of data that a user can enter into the field (text, numeric, date, etc.) or determines how the field functions in the database, for example, an image displays in the field when a user selects an image file for an image field, date fields provide a date picker for data entry into those field types. Each field type is marked with a unique icon in application.
  - o **Field Types** – The table below lists the field types that are available in a Progeny database, the icon used to represent the field type, and a description of each field.

Field Type	Icon	Description
Text		Alphanumeric characters (all digits and printable characters) up to a maximum of 32,000 characters.
Date		M/D/YY or M/D/YYYY
Numeric		The digits 0-9. Negative numbers and decimals allowed.
Yes/No		Checkbox field that holds a value of either 1 (to indicate Yes) or 0 (to indicate No).
Dropdown		Displays a list of pre-defined list of items from which the user can select one item.
Image		Allows for the display of an image in an allowed format in the field.
Table		The field is to be included in a table. The field does not have a pre-defined value.
Lookup Table		The field is to be included in a table. The fields have pre-defined values.
Computed		No data entry is allowed in this field. Instead, a non-editable value is displayed in the field. The value that is displayed is automatically calculated based on the expression, function, or constant assigned to the field or values that are contained in other fields.
Summary		Provides summary information for a given column on a per pedigree basis. The summary can be an average, a total count, a minimum value, a maximum value, or a sum total.
Table Summary		A computed field that summarizes the data for a given column in a given table.
Hyperlink		Links to an external document, website, and so on.

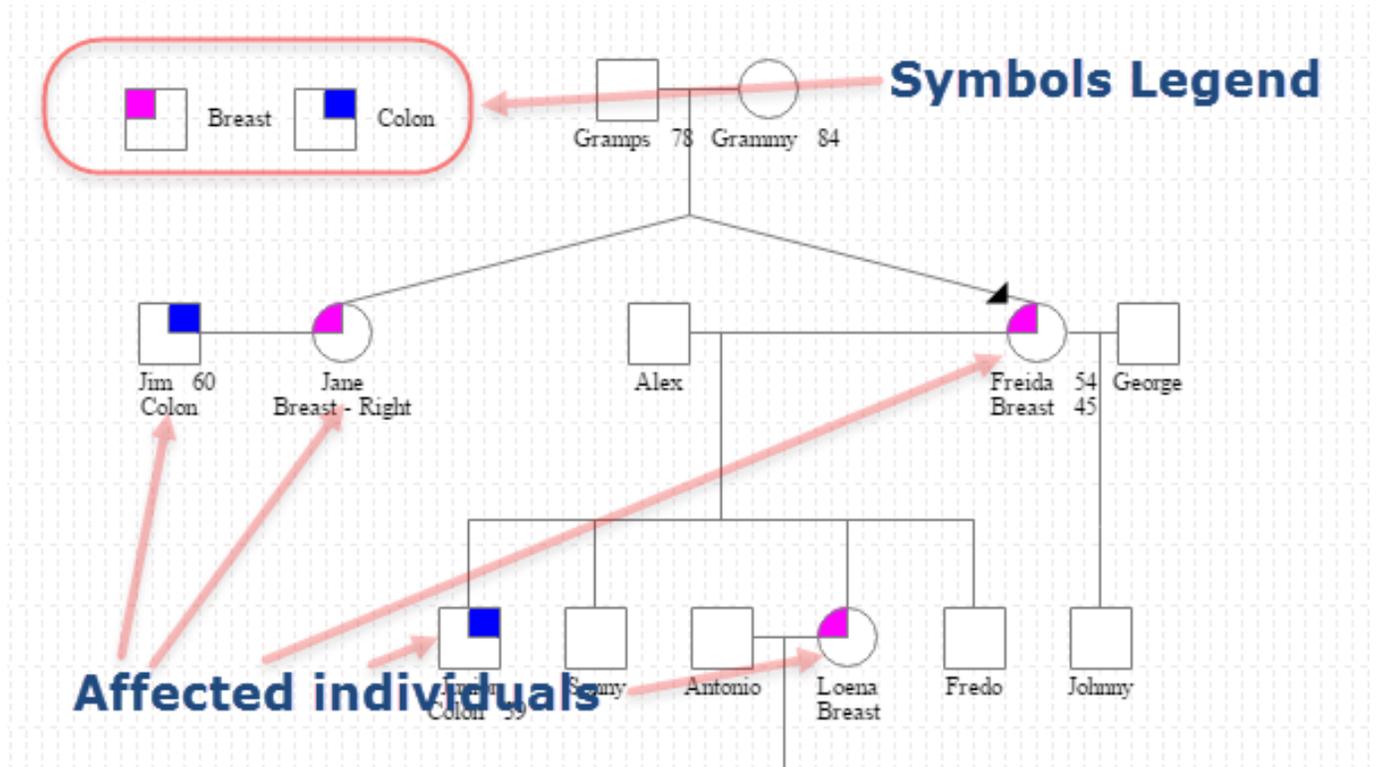
- **Formats** - After your Progeny administrator has configured the layouts of information on the pedigree canvas (subtext, symbols, pedigree fields), within the individual datasheets (tabs and fields), and for spreadsheet queries, each configuration can be saved as a format (template). These formats can then be loaded and applied within Progeny as needed.

*Selecting formats for your pedigree:*

The screenshot shows the Progeny software interface with the **Pedigree Settings** dialog box open. The dialog box has a sidebar on the left with buttons for **Pedigree Display**, **Pedigree Dimensions**, **Smartdraw Options**, and **Formats**. The **Formats** button is highlighted with a red circle and the annotation "2 select the Formats button". The main area of the dialog box has four sections: **Symbols** (with a dropdown set to "Cancer"), **Subtext** (with a dropdown set to "Cancer"), **Fields** (with a dropdown set to "Select format"), and **Markers** (with a dropdown set to "Select format"). The **Fields** dropdown menu is open, showing options: "None", "Ancestry", and "Load new format...". A red arrow points to the "Load new format..." option, with a red circle and the annotation "3 select the button for which type of format you would like to load. Recently loaded formats will be displayed. Select one or search for another format by selecting 'Load new format...'." The top toolbar of the software has a red circle and the annotation "1 select the Actions button" pointing to the **Actions** menu.

- Pedigree Symbols Formats – These formats will display their symbols on the individual’s icon, typically to graphically represent a medical condition defined in the Symbols Legend.

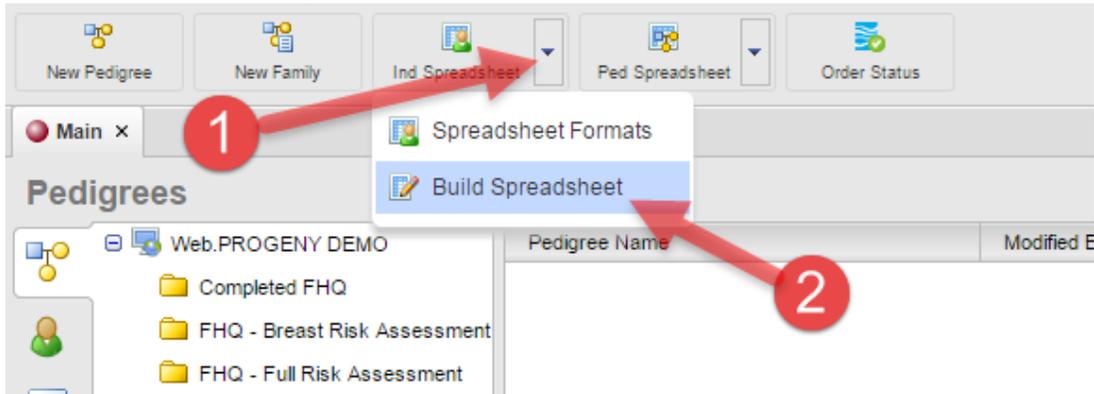
*Symbols Legend and Symbols shown on Individual Icons:*



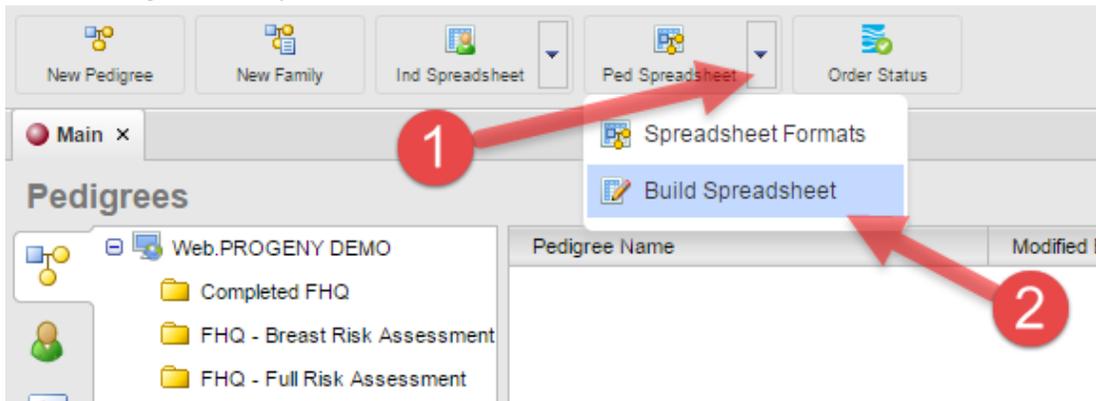
- Icon Subtext Formats – The Icon Subtext is the text displayed below an individual icon on a pedigree. This information is specific to the individual. These formats are built by your Progeny administrator then applied to pedigrees as needed by Progeny Web client users.
- Pedigree Fields Formats – Pedigree fields are pedigree level fields displayed on a pedigree canvas showing information specific to that pedigree, like maternal or paternal ancestry. These formats are built by your Progeny administrator then applied to pedigrees as needed by Progeny Web client users.
- Individual Datasheet Formats – Individual datasheets are created to display and edit multiple fields of data on an individual. This information can be separated onto tabs for better organization.
- Individual Data Spreadsheet (Query) Formats – Individual Data Spreadsheets are used for creating search queries of the database fields and customizing how that information is displayed. This is a powerful tool which can be used to perform specific and granular queries of your database information. These custom queries can be saved as formats, then run or edited as needed.

- Spreadsheets Queries – Spreadsheet Queries are used for searching for specific field data and displaying the results in a spreadsheet. You can search either your Individual level fields or your Pedigree level fields.

**Build an *Individual* level Spreadsheet:**



**Build a *Pedigree* level Spreadsheet:**



- From these levels you can select which fields you wish to query, add logical operators to your search, and specify how the results are sorted. This is a powerful tool which can be used to perform broad and general, or specific and granular queries of your database. After you build a query it can be saved as a format, then re-run or edited as needed.

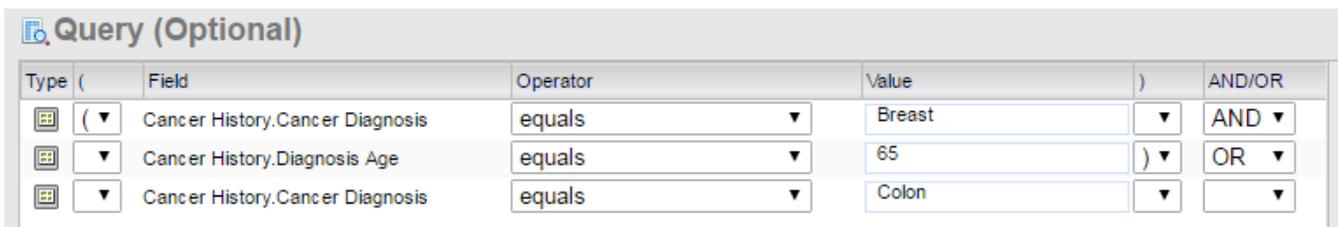
- o Query Panes – The four panes on a query screen are for building the query.
  - On the left is the Fields pane which lists the fields of your database. You can search for fields in this pane by typing a portion of the field name into the search field atop the Fields pane.
  - The upper right Columns pane is used to list the columns (fields) you wish displayed on the results spreadsheet. The top to bottom ordering of fields in this pane will reflect as left to right columns on the spreadsheet results. You can change the order of the spreadsheet results columns by moving each field up or down in the Columns pane.
  - The middle right pane determines the sort order of your query results. Drag fields from the Fields pane into this pane or use the Add to sort icon on a Column field to copy the field into the Sort pane.
  - The Query pane is where you can add specific conditions to a field, e.g. Last Name equals Smith.

Spreadsheet Query Panes: Fields, Columns, Sort, and Query

The screenshot shows a software interface for creating spreadsheet queries. At the top, there are buttons for 'Run', 'Load Fmt', and 'Save Fmt'. Below these are tabs for 'Main' and 'New Ind Spreadsheet'. The main area is divided into four panes:

- Fields:** A tree view on the left labeled 'list of database fields' showing categories like 'Data Folders', 'System Fields', 'Individual Data Folders', 'Core Fields', 'Medical History', 'PHI', 'Risk Model Fields', 'Summary Fields', 'Table Fields - NO QUERY', 'Custom Fields', 'Pedigree Data Folders', and 'Core Fields'.
- Columns:** A central pane labeled 'Columns' with the instruction 'which columns you want displayed on the spreadsheet results and in what order'. It contains a table with columns 'Type' and 'Field' and the text 'Drag Fields From Warehouse And Drop Here'.
- Sort (Optional):** A pane labeled 'Sort (Optional)' with the instruction 'which columns you want the results sorted by'. It contains a table with columns 'Type', 'Field', and 'Direction' and the text 'Move Fields From Columns Panel Above'.
- Query (Optional):** A pane labeled 'Query (Optional)' with the instruction 'add logical operators to fields to target your search results'. It contains a table with columns 'Type', 'Field', 'Operator', 'Value', and 'AND/OR' and the text 'Move Fields From Columns Panel Above (Or Drag Fields From Warehouse And Drop Here)'.

- Building Queries – To build a Spreadsheet Query first select the level (Individual or Pedigree) you wish to query as shown above.
  - 1) Select which field(s) you want shown on the spreadsheet results - You can use the search field to quickly find the field you are looking for. Just type in any portion of the field name and click the magnifying glass icon on the right side of the search field.
  - 2) Drag the field into the Columns and/or Query panes.
  - 3) From the fields you have dragged into the Columns pane use the icons available in the *mouse over menu* to add it to the Sort or Query panes.
  - 4) Specify whether you would like to sort in ascending (default) or descending order. You may sort by several fields. The first field will be the primary sort column, the second field the secondary, and so on.
  - 5) Configure the logical operators, values, Boolean operators, and parentheses (to apply an order of operations) in the Query pane.
    - Order of operations for a query:  
When carrying out a multiple fields query, use parentheses to define the order of operations for a query. The order of operations determines the queries that must be carried out first in a series of queries. For example, the below image shows a query that first sorts individuals who were diagnosed with breast cancer at the age of 65. The query then sorts individuals who were diagnosed with colon cancer. Because this query uses the OR operator, the query returns individuals who meet either query criteria.



- Logical Operators - The following logical operators are available to target your search results:

Operator	Description
begins with	Search for an item where the specified field contains data that begins with the search criteria. For example, if the query field for individuals is the Weight field, and you specify Weight begins with 17, then only those individuals for whom the weight begins with a 17 (17 or 170-179) are returned in the search.
contains	Search for an item where the specified field contains any instance of the search criteria. For example, if the query field for individuals is the Weight field, and you specify Weight contains 75,
does not begin with	Search for an item where the specified field contains data that does not begin with the search criteria. For example, if the query field for individuals is the Weight field, and you specify Weight does not begin with 17, then only those individuals for whom the weight does not begin with a 17 (0-16, 18 - 169, and so on) are returned in the search.
does not contain	Search for an item where the specified field does not contain any instance of the search criteria. For example, if the query field for individuals is the Weight field, and you specify Weight does not contain 75, then all individuals who have a weight in which 75 does not appear (0-74, 76-174, 176-274, and so on) are returned in the search.
does not end with	Search for an item where the specified field contains data that does not end with the search criteria. For example, if the query field for individuals is the Weight field, and you specify Weight does not end with 75, then only those individuals for whom the weight does not end with a 75 (074, 76-174, 176-274, and so on) are returned in the search.

does not equal	Search for an item that meets any criteria other than the specified value. For example, if the query field for individuals is the Weight field, and you specify Weight $\neq$ 175, then only those individuals whose weight does not equal 175.
ends with	Search for an item where the specified field contains data that ends with the search criteria. For example, if the query field for individuals is the Weight field, and you specify Weight ends with 75, then only those individuals for whom the weight ends with a 75 (75, 175, 275, and so on) are returned in the search.
equals	Search for an exact match. For example, if the query field for individuals is the Weight field, and you specify the search criteria as Weight = 175, then only those individuals whose weight is exactly 175 are returned in the search.
in	Allows for comma separated values to be entered into a field so that multiple items can be searched and returned in the search results. For example, if the query field for individuals is the Weight field, and you specify Weight in 75, 80, 85, 90, then all individuals whose weight is exactly 75, 80, 85, or 90 are returned in the search.  Note: You can copy and paste a list of values from .csv file into a query of this type.
is blank	Search for an item where the specified field contains absolutely no data. For example, if the query field for individuals is the Weight field, and you specify Weight is blank, only those individuals for whom data has not been entered into the Weight field are returned in the search.  Note: A zero (0) is an actual data value. This means that if a zero (0) has been entered into the Weight field for an individual, then the individual is not returned in the search.
is greater than	Search for an item that is greater than the specified value. For example, if the query field for individuals is the Weight field, and you specify Weight > 175, then only those individuals whose weight is greater than 175 are returned in the search.
is greater than or equal to	Search for an item that is greater than the specified value or is an exact match for the specified value. For example, if the query field for individuals is the Weight field, and you specify Weight $\geq$ 175, then those individuals whose weight is exactly 175 or greater are returned in the search.
is less than	Search for an item that is less than the specified value. For example, if the query field for individuals is the Weight field, and you specify Weight < 175, then only those individuals whose weight are less than 175 are returned in the search.
is less than or equal to	Search for an item that is less than the specified value or is an exact match for the specified value. For example, if the query field for individuals is the Weight field, and you specify Weight $\leq$ 175, then those individuals whose weight is exactly 175 or less are returned in the search.
is not blank	Search for an item where the specified field contains any valid data. For example, if the query field for individuals is the Weight field, and you specify Weight is not blank, all individuals for whom data has been entered into the Weight field are returned in the search.  Note: A zero (0) is an actual data value. This means that if a zero (0) has been entered into the Weight field for an individual, then the individual is returned in the search.
is not in	Allows for comma separated values to be entered into a field so that multiple items can be searched and excluded from the search results. For example, if the query field for individuals is the Weight field, and you specify Weight is not in 75, 80, 85, 90, then all individuals whose weight is not exactly 75, 80, 85, or 90 are returned in the search.  Note: You can copy and paste a list of values from .csv file into a query of this type.
is not like	A pattern matching search based on the keyword "like." An underscore (_) is used to match exactly one character, and the percent sign (%) is used to indicate any number of characters. For example, if the query field for individuals is the Weight field, then to search for all individuals whose weight is not like 75, select "is not like" as the operator and enter %75 in the Value field. The % indicates that any number of characters can come before 75, for example, 0 -74, 176 - 184, 186 - 274, and so on.  Note: You can use the % anywhere in the search criteria, for example, 75% or 7%5.
like	A pattern matching search based on the keyword "like." An underscore (_) is used to match exactly one character, and the percent sign (%) is used to indicate any number of characters. For example, if the query field for individuals is the Weight field, then to search for all individuals whose weight is like 75, select "like" as the operator and enter %75 in the Value field. The % indicates that any number of characters can come before 75, for example, 75, 175, 275, and so on.  Note: You can use the % anywhere in the search criteria, for example, 75% or 7%5.

At this point you can save this custom query as a format so you can quickly select it in the future to run it again. [See the section \*Selecting, Editing, and Saving Query Formats\* below.](#)

6) Click the Run button to run the query.

### Building Spreadsheet Queries:

The screenshot shows a software interface for building spreadsheet queries. It features a 'Fields' pane on the left with a search bar and a list of folders and fields. A 'Columns' pane on the right shows a table with columns for 'Type', 'Field', and 'Path'. Below the 'Columns' pane is a 'Sort (Optional)' section with a table for 'Type', 'Field', and 'Direction'. At the bottom is a 'Query (Optional)' section with a table for 'Type', 'Field', 'Operator', 'Value', and 'AND/OR'. Red arrows and numbers 1-6 point to specific elements: 1 points to the search bar in the Fields pane; 2 points to a field being dragged from the Fields pane to the Columns pane; 3 points to icons in the Columns pane; 4 points to the Direction dropdown in the Sort section; 5 points to the Query section; and 6 points to the Run button at the top left.

1 Navigate your field explorer to find your fields, or search for a field by typing a portion of the field name then clicking the magnifying glass to list the results.

2 Drag the desired field(s) into the **Columns** and **Query** panes.

3 You may use these icons (available upon 'mouse over') to add fields to the **Sort** or **Query** panes. Select the **X** to remove the field from the panes.

4 Select the **Direction** dropdown menu to specify whether you wish the field to be sorted in *ascending* or *descending* order.

5 Configure the logical Operator, Value, and boolean operator (AND/OR) to build logical statements and further target your query results. Use the parentheses to group logical statements.

6 Run

- Spreadsheets – Spreadsheets show the results of your Queries in a layout similar to an Excel spreadsheet with queried fields as the columns and records as rows. Table results appear as additional rows beneath the corresponding record. You may edit field data directly on the spreadsheet, filter the results, and export the spreadsheet results to a text file.

**flat fields and table fields**

**single record with table field results**

Pedigree Name	Name: First	Name: Last	Date of Birth	Cancer History?	Cancer History.Cancer Diagnosis	Cancer History.Diagnosis Age
TestAA4	Lolita	Lacambra	Jun 23, 1958			
simple	Simon	Simple				
TestAA5	Sharlene	Barni	Jan 3, 1945			
					Breast - Left	48
TestAA6	Jane	Doe	Jan 1, 1949			
					Ovary	66
					Colon	
smple	SSample	SSimon				
Test SH 01				Yes		
					Breast	44
TestAA7	Jane	Doe	Jan 1, 1953			
Test SH 02				Yes		
					Breast	40
TestAA8	Jane	Doe	Jan 1, 1959			
					Ovary	57
Test SH 03				Yes		
					Breast	52
					Breast	58
TestAA9	Jane	Doe	Jan 1, 1952			
					Breast	64

- Entering Data Into Spreadsheets – Click inside a cell to edit its contents.

Click inside a cell to edit its contents:

Pedigree Name	Name: First	Name: Last	Date of Birth	Cancer History?	Cancer History.Cancer Diagnosis
TestAA4	Lolita	Lacambra	Jun 23, 1958		
simple	Simon	Simple			
TestAA5	Sharlene	Barni	Jan 3, 1945		
TestAA6	Jane	Doe	Jan 1, 1949		Breast - Left
					Acoustic Neuroma
					Adrenal
					Adrenocortical carcinoma
					Ampulla of Vater
					Angiosarcoma
					Anus
					Appendix
					Apudoma
					Astrocytoma
					Basal Cell
					Bile Duct
					Bladder
					Bone
					Brain
					Breast
					Breast - Left
					Breast - Right
					Breast - Both
TestAA7	Jane	Doe	Jan 1, 1953		
Test SH 02				Yes	
TestAA8	Jane	Doe	Jan 1, 1959		
Test SH 03				Yes	
TestAA9	Jane	Doe	Jan 1, 1952		

select a field to edit its contents

- Filtering Spreadsheet Results – You can further target query results by adding filters on column headings. Just right click the column heading and select **Filter**.

Right-click the column heading then select **Filter**:

Individual Spreadsheet		
Pedigree Name	Name: First	Name: Last
TestAA4	Lolita	Lacambra
simple	Simon	Simple
TestAA5	Sharlene	Barni

Select a logical operator and its value. You may enter two logical operators joined by an *and* or *or* conditional.

Select 1) first logical operator and value, 2) select joining conditional, 3) select 2<sup>nd</sup> logical operator and value, 4) click **Filter**:

### Individual Spreadsheet

Pedigree Name	Name: First	Name: Last	Date of Birth	Cancer History?	Cancer His
TestA,A4	Lolita	Lacambra	Jun 23, 1958		
simple	Simon	Simple			
TestA,A5	Shar				
TestA,A6	Jane				
simple	SSar				
Test SH 01					
TestA,A7	Jane				
Test SH 02					
TestA,A8	Jane				
Test SH 03				Yes	Ovary
					Breast
					Breast
TestA,A9	Jane		1, 1952		Breast
TestA,A10			14, 1991		
Test JV 1	First		10, 1956		Breast
TEST JV 2	First		10, 1951		

#### Filter Column

Show rows where Name: First:

And  Or

- ends with
- equals
- does not equal
- is less than
- is less than or equal to
- is greater than
- is greater than or equal to
- begins with
- does not begin with
- ends with
- does not end with
- contains
- does not contain
- like
- is not like
- is blank
- is not blank

Filter

In the above example the **Name: First** column is filtered to show only records that equal Jane or end with est as shown below.

Filtered results:

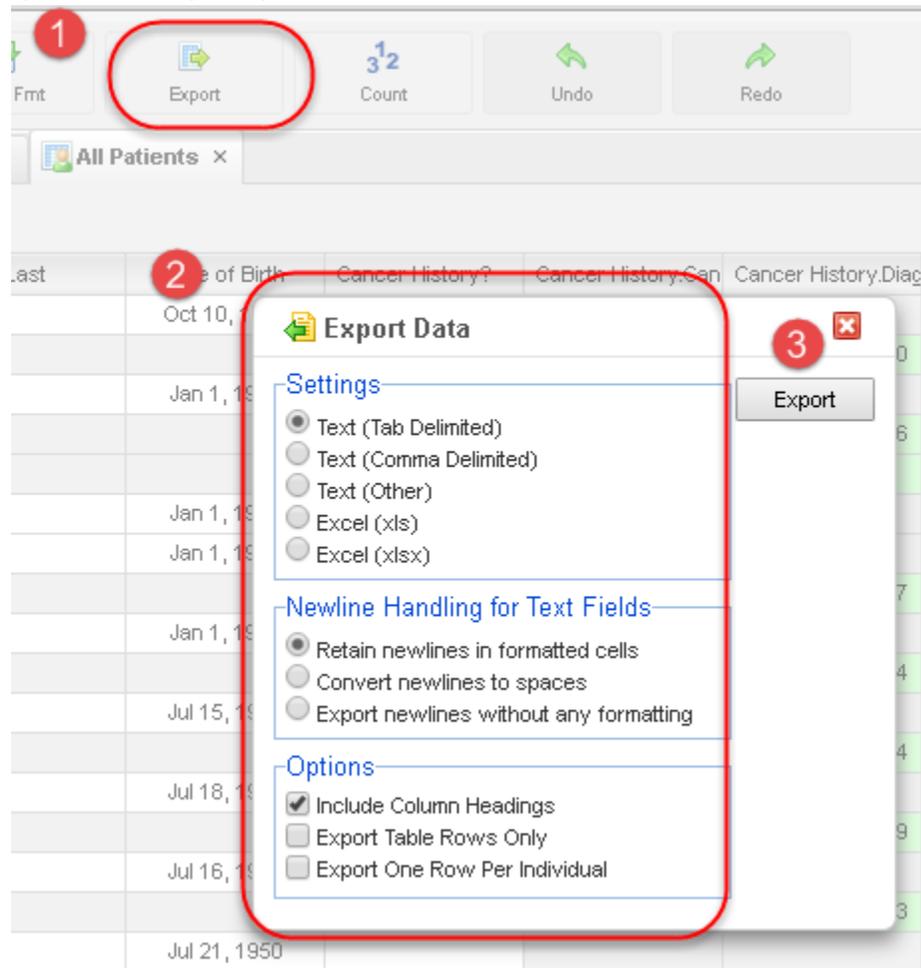
Individual Spreadsheet							
Pedigree Name	Name: First	<input checked="" type="checkbox"/> Name: Last	Date of Birth	Cancer History?	Cancer History.Can	Cancer History.Diag	
REMTTEST3	Teest	Tester	Oct 10, 1990				
TestAA6	Jane	Doe	Jan 1, 1949		Breast		40
					Ovary		66
					Colon		
TestAA7	Jane	Doe	Jan 1, 1953				
TestAA8	Jane	Doe	Jan 1, 1959				
					Ovary		57
TestAA9	Jane	Doe	Jan 1, 1952				
					Breast		64
Test JV 3	Test	Subject	Jul 15, 1970		Thyroid - Papillary		34
test JV 4	Test	Test	Jul 16, 1947		Thyroid		39
test JV 5	Test	Test5	Jul 16, 1936		Breast		43
test JV 6	Test	Test6	Jul 21, 1950		Breast		37
Test JC 7	Test	Test7	Jul 10, 1945		Breast		49
Test JV 8	Test	Test8	Jul 27, 1933		Breast		38
test JV 9	Test	Test9	Jun 30, 1997		Brain		19
Test JV 10	Test	Test10	Jul 17, 1959		Breast		49
test212	Test						

Spreadsheet results filtered to show only records where the First Name column equals Jane or ends with est.

You may add additional filters to the other columns. To clear the filters, just right click the column headings and select **Clear Filter**.

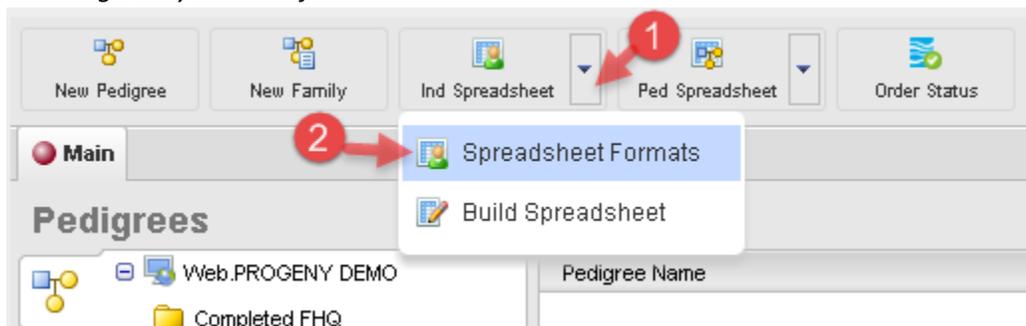
- Exporting Spreadsheet Results – To export your spreadsheet in a text or Excel file format 1) select the Export button, 2) choose your formatting options, and then 3) click the **Export** button as shown below. The file will be saved to your web browser’s default download location.

**Spreadsheet Export options:**

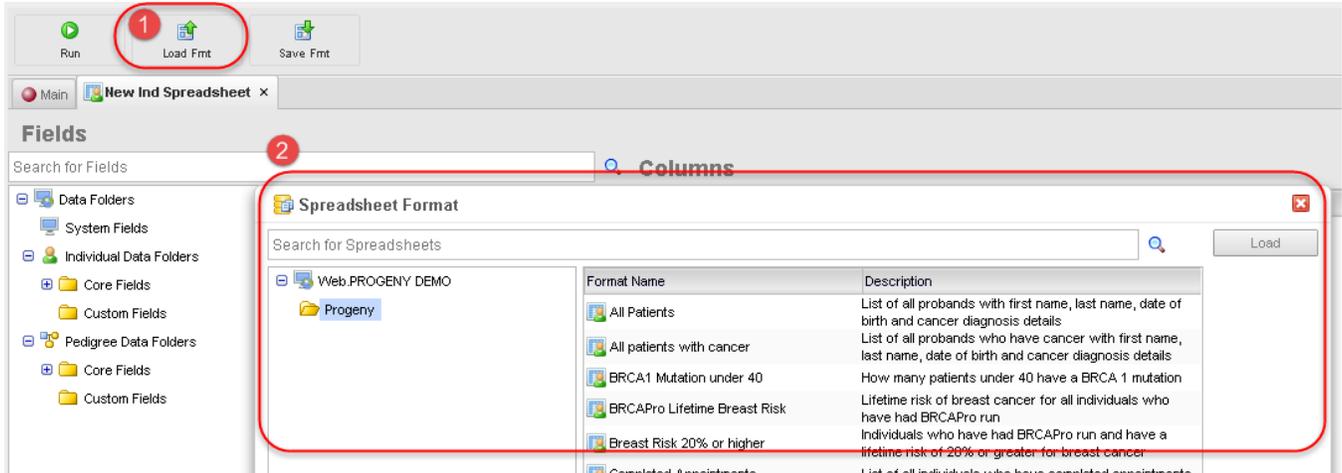


- Selecting, Editing, and Saving Query Formats – Once you have built your query you can save it as a *format* which can be selected and ran again, or edited as needed.
  - Selecting Formats - Spreadsheet Query Formats can be selected from the Main Progeny tab, from the Query Builder screen, and from the Spreadsheet results screen as shown below. Once selected, they may be edited as described in the [Building Queries](#) section above.

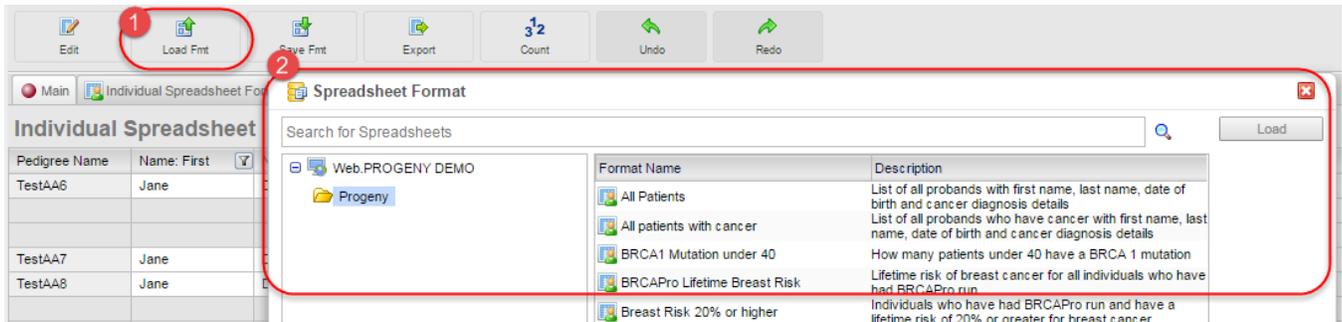
**Selecting Query Formats from *Main* tab:**



**Selecting Query Formats from the Query Builder screen:**

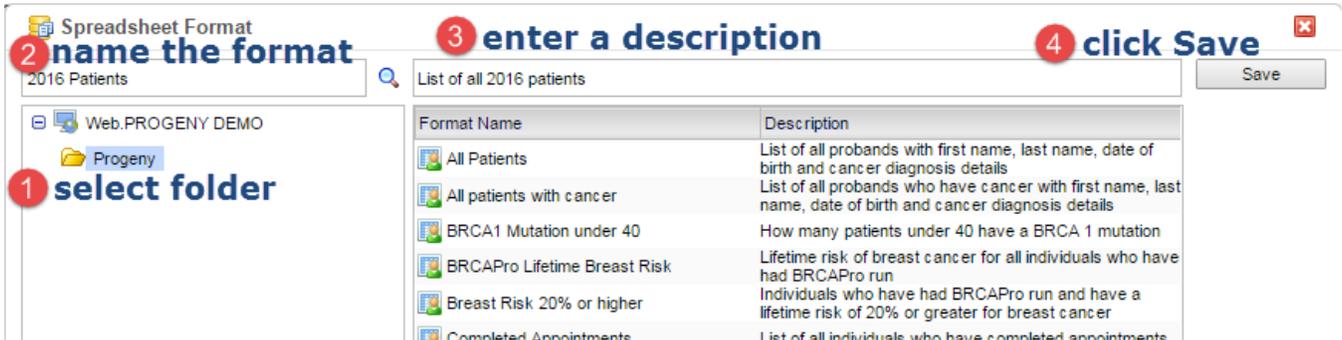


**Selecting Query Formats from the Spreadsheet screen:**



- Saving Formats – After building or editing queries, they may be saved by selecting the **Save Fmt** (save format) button atop the current Progeny screen. You can select which folder you would like to save the format in to better organize your formats (the folders can only be created within the Progeny Desktop client), name the format and give it a description as shown below.

**Saving a Spreadsheet Query format:**



- Family History Questionnaires – The Progeny Family History Questionnaires (FHQ) **Invites** module allows for the managing of questionnaires and patient invitations. You can use this module to send email invitations containing a link for patients to participate in a selected questionnaire. The patient will follow the link to create a username and password and log in to complete the questionnaire. Their responses will build their pedigree and enter data into their datasheet. Clinicians can then manage and edit the pedigrees and datasheets as needed.

The **Invites** module screen:

The screenshot shows the 'Invites' module interface. At the top, there are buttons for 'Invite Patient', 'Edit Questionnaires', 'Query Formats', and 'Email Templates'. The main area contains a list of individuals with columns for 'Individual Name', 'Questionnaire Name', 'Invite Status', 'Date Invited', 'Date Started', and 'Invited By'. A context menu is open over the first row, showing options like 'New Invite', 'Update Status', 'Lock Invite', 'Open Individual Datasheet', 'Open Pedigree', 'Show History Log', and 'Test'. A dropdown menu for 'Completed Within' is also visible, showing options like '120 Days', '90 Days', '60 Days', '30 Days', '3 Weeks', '2 Weeks', '1 Week', '6 Days', '5 Days', '4 Days', '3 Days', '2 Days', and '1 Day'. A right-click menu is open over the 'Filter' column heading, showing options like 'Filter', 'Jump To Row', 'Add To Sort', 'Add Column', 'Insert Column', and 'Delete Column'. The left sidebar shows the 'Invites Module' icon and a list of questionnaire types: 'Breast Risk Assessment', 'Full Risk Assessment', and 'Pre-Screening Questionnaire'.

**Invites Module buttons for sending invitations, editing questionnaires, creating and loading queries, and managing email templates**

**Filter listed individuals by Invite Status and invitee**

**Filter listed individuals by timeframes**

**Right-click column heading to reveal smartlist menu options**

**Right-click individual to manage their invitation**

Individual Name	Questionnaire Name	Invite Status	Date Invited	Date Started	Invited By
Smith Family_1	Full Risk Assessment	Sent	May 20, 2016 11:29:50 AM		progeny
Carito Family_1	Full Risk Assessment	Completed	May 20, 2016 6:46:15 PM	May 20, 2016 7:30:49 PM	DemoUser
Smith4 Family_1	Full Risk Assessment	Sent	May 20, 2016 7:30:49 PM		progeny
Smith123 Family_1	Full Risk Assessment	Completed	May 23, 2016 7:27:48 AM	May 23, 2016 7:27:48 AM	DemoUser
ecardonatestest123's f	Full Risk Assessment	Completed	May 26, 2016 3:17:50 PM	May 26, 2016 3:17:50 PM	Generic Link
humberto123's family_1	Full Risk Assessment	Completed	May 27, 2016 3:23:31 PM	May 27, 2016 3:23:31 PM	Generic Link
Smith Family_1	Full Risk Assessment	Completed	Jun 1, 2016 4:51:41 PM	Jun 1, 2016 4:51:41 PM	progeny
New Invite	Full Risk Assessment	Completed	Jun 8, 2016 10:21:08 AM	Jun 8, 2016 10:21:08 AM	progeny
Card	Full Risk Assessment	Completed	Jun 8, 2016 10:21:08 AM	Jun 8, 2016 10:21:08 AM	progeny
Card	Full Risk Assessment	Completed	Jun 9, 2016 3:23:46 PM	Jun 9, 2016 3:23:46 PM	progeny
Card	Full Risk Assessment	Completed	Jun 15, 2016 10:53:47 AM	Jun 15, 2016 11:11:11 AM	progeny
Card	Full Risk Assessment	Completed	Jun 21, 2016 2:34:11 PM	Jun 21, 2016 2:34:11 PM	progeny
Card	Full Risk Assessment	Completed	Jun 24, 2016 11:15:28 AM	Jun 24, 2016 11:15:28 AM	progeny
Card	Full Risk Assessment	Completed	Jul 1, 2016 2:28:52 PM	Jul 1, 2016 2:28:52 PM	Generic Link
test	Full Risk Assessment	Partially Completed	Jul 5, 2016 9:27:16 AM	Jul 5, 2016 9:27:16 AM	Generic Link
test123456778's fam	Full Risk Assessment	Partially Completed	Jul 5, 2016 2:59:22 PM	Jul 5, 2016 2:59:22 PM	Generic Link
testtesting12345's family	Full Risk Assessment	Partially Completed	Jul 6, 2016 8:23:36 AM	Jul 6, 2016 8:23:36 AM	Generic Link
Test Family 565_1	Full Risk Assessment	Created	Jul 21, 2016 3:50:46 PM		progeny

- o Questionnaires – In the free Progeny Cloud version of our FHQ there are 3 preformatted questionnaire templates; Pre-Screening Questionnaire, Breast Risk Assessment, and Full Risk Assessment. Please contact Progeny if you would like to discuss upgrading to a customized questionnaire. On premise customers may contact our FHQ Implementation Team to build one or more customized FHQ's for your specific purpose. Click the **Edit Questionnaire** menu option to open your **Questionnaire Management** screen as shown below.

The **Questionnaire Management** screen:

Menu buttons to save changes made to questionnaires, create, delete and copy existing questionnaires

Questionnaire Name	Datasheet Format Name	E-mail Template Name
Breast Risk Assessment	Breast Risk Assessment	Invite Email
Full Risk Assessment	Full Risk Assessment	Invite Email
Pre-Screening Questionnaire	Pre-Screening (Breast)	Invite Email

List of your current questionnaires. Select one to display its settings in the tabs below.

Tabs for managing and editing the different parts of your questionnaires

General settings | Email Settings | Status Actions | Login Screen | Profile Page | Consent Page | Datasheet | Family Builder | Final Notes | Summary Page | Relatives Invites | Submit Page

Questionnaire Name: Full Risk Assessment | Questionnaire Type:  Individual  Family

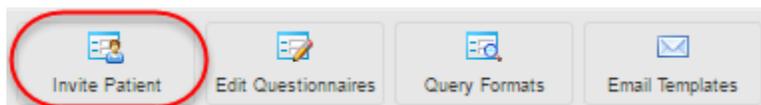
Questionnaire Language: English - United States | Make passcode protected:

Configuration Folder: FHQ - Full Risk Assessment | Make Gender Required:

Generic Link: [http://eugenetest.progenygenetics.com/FHQ?genlink=HJwxFZk\\_JIUFeglbXysjLWLE4LJp1jRC6KZsLZm0vQ%3D](http://eugenetest.progenygenetics.com/FHQ?genlink=HJwxFZk_JIUFeglbXysjLWLE4LJp1jRC6KZsLZm0vQ%3D)

Help text: If you have questions about how to answer your family history questionnaire, please use the contact information to contact Support. Please note that support for the Family History Questionnaire is only available during normal business hours (8am-4pm EST).  
Phone: (800)776-4369  
Email: [support@progenygenetics.com](mailto:support@progenygenetics.com)

- Invitations – Click the **Invite Patient** button to start the wizard for sending invitations.



You will be prompted to select the following options:

- Invite new patient or existing patient or relative,
- Select which of your questionnaires you wish to send,
- Next screen:
  - Select which folder in your database you want the resulting pedigree to be saved in,
  - Enter a Family name,
  - Select a gender,
  - Enter the email address you are sending the invitation to,
- Enter first and last name, and date of birth.

You then will be shown a preview of the email as the recipient will see it and have the opportunity to make any changes, like update the clinical contact information, for this email invitation *only*. Click the **Send an Invite** at the bottom of this screen to send the email invitation.

- Querying Invitations – Once your invitations have been sent you can check on their status from the main Invites module screen. There are several options for filtering so you can find the group of, or specific invitation(s) you wish to view as shown below.

Options for querying your invitations:

The screenshot displays the 'Invites' module interface. At the top, there are navigation buttons: 'Invite Patient', 'Edit Questionnaires', 'Query Formats', and 'Email Templates'. Below these is a 'Main' header. On the left, a sidebar shows a tree view under 'Web.PROGENY DEMO' with options: 'Breast Risk Assessment', 'Full Risk Assessment' (selected), and 'Pre-Screening Questionnaire'. The main area is divided into two sections. The upper section, labeled '2', contains 'Invite Status' and 'Invited By' filters. 'Invite Status' includes options like 'Invite Created', 'Invite Sent', 'Questionnaire Started', etc. 'Invited By' includes 'progeny', 'DemoUser', and 'Generic Link'. Below these are three dropdown menus for 'Invited Within', 'Started Within', and 'Completed Within', all set to 'No Filter'. A 'Query...' button shows '19 rows'. The lower section, labeled '3', is a table with columns: 'Individual Name', 'Questionnaire Name', 'Invite Status', 'Web User ID', and 'Date Invited'. The table lists various family names and their corresponding invitation details.

Individual Name	Questionnaire Name	Invite Status	Web User ID	Date Invited
Smith Family_1	Full Risk Assessment	Sent		May 20, 2016 11:29:50 AM
Carlito Family_1	Full Risk Assessment	Completed	JCarlito	May 20, 2016 6:46:15 PM
Smith4 Family_1	Full Risk Assessment	Sent	ecardona@progenygenetics.com	May 20, 2016 7:30:49 PM
Smith123 Family_1	Full Risk Assessment	Completed	testing1234	May 23, 2016 7:27:48 AM
ecardonatesttest123's f	Full Risk Assessment	Completed	ecardonatesttest123	May 26, 2016 3:17:50 PM
humberto123's family_1	Full Risk Assessment	Completed	humberto123	May 27, 2016 3:23:31 PM
Smith Family78_1	Full Risk Assessment	Completed	ecardona123@progenygenetics.co	Jun 1, 2016 4:51:41 PM
Smith Family 787_1	Full Risk Assessment	Completed	ecardona12345	Jun 8, 2016 10:21:08 AM
Cardona Family 123_1	Full Risk Assessment	Completed	ecardona676	Jun 9, 2016 3:23:46 PM
Cardona1025 Family_1	Full Risk Assessment	Completed	ecardona10251025	Jun 15, 2016 10:53:47 AM
testing-0002_1	Full Risk Assessment	Sent		Jun 21, 2016 2:34:11 PM
Cardona1011 Family_1	Full Risk Assessment	Completed	cardona10222	Jun 24, 2016 11:15:28 AM
meronazage1025's fami	Full Risk Assessment	Completed	meronazage1025	Jul 1, 2016 2:28:52 PM
testing1234567's family_	Full Risk Assessment	Partially Completed	testing1234567	Jul 5, 2016 9:27:16 AM

- 1) Left side of the screen - Select which questionnaire you wish to query.
- 2) Upper right side of the screen - Select the invitation status and invitee you wish to query by.
- 3) Lower right side of the screen – Right click the column headings to reveal the [smart list](#) where you can further filter the displayed results. Please see the [Smart List](#) section above for an explanation of Progeny Smart Lists.

- Risk Calculations – Progeny Web software has integrated several Risk Assessment Models to assist clinicians with their workflow, making it more efficient to:
  - run *individual or multiple simultaneous* risk models on a proband,
  - set **Risk Threshold** values to highlight results over a specified threshold value in **red**,
  - view, save, delete, and export risk reports,
  - retrieve previously saved risk reports for comparison to new risk reports.
  
- o Risk Models – Currently, Progeny has integrated the following risk models: BRCAPRO, MMPRO, MelaPRO, PancPRO, TYRER-CUZICK, GAIL, and PREMM (1, 2, & 6).
  
- o Mapping Fields – In order to use the Risk Assessments models, your database fields have to be mapped to those of the risk models.
  - **NOTE:** Please contact Progeny Support at [support@progenygenetics.com](mailto:support@progenygenetics.com) to enquire about having your database(s) mapped to use the risk models.
  
- o Running Risk Assessment Calculations – Once your database fields have been mapped you can run Risk Assessment(s) for the proband on a pedigree. Select the proband (or right click an individual, and select **Change Attribute** to change them to the proband) and click the **Show Risk** button on the screen menu.

Click the **Show Risk** menu button to switch to the Risk Model screen:



Click the **Calculate** button to show the **Risk Assessment Settings** screen where you can chose the risk models you wish to run on the proband and set the risk thresholds for cancer and mutation probabilities.



The **Risk Threshold** setting will highlight in **red** all risk calculation results above this value. If there are any errors preventing the proper calculation of the risk assessment(s) they will be noted in the **Validation Errors** section above the calculation results.

Risk Assessment Settings screen:

### Risk Assessment Settings

**Display the following risk assessment models:**

<input checked="" type="checkbox"/> BRCAPro	<input checked="" type="checkbox"/> MelaPro
<input checked="" type="checkbox"/> MMRPro	<input checked="" type="checkbox"/> Tyrer-Cuzick
<input checked="" type="checkbox"/> PancPro	<input checked="" type="checkbox"/> Premm
	<input checked="" type="checkbox"/> Gail

Only models that have been configured can be chosen. [Configure Risk Models](#)

**Risk Threshold:**  % Cancer  % Mutation

**Reporting:**  Display data inputs

Do not show this dialog again

A circular 'timer' appears while the risk assessment tool calculates the results:



Risk Assessment calculation results:

**Risk Assessment results**

Risk Alice 8/1/16

Validation Errors

Cancer Risk 8

BREAST	5YR	LIFE
GAIL	0.3%	6.4%
BRCAPRO	0.5%	11.2%
TYRER-CUZICK	0.5%	12.4%
<b>OVARIAN</b>		
BRCAPRO	0.0%	1.2%
<b>COLORECTAL</b>		
MMRPRO	0.0%	3.3%
<b>ENDOMETRIAL</b>		
MMRPRO	0.0%	1.0%
<b>MELANOMA</b>		
MELAPRO	0.2%	1.0%
<b>PANCREATIC</b>		
PANCPRO	0.0%	1.3%

Risk Threshold values highlighted in red

**Mutation Probabilities results**

Mutation Probabilities 16

<b>BRCAPRO</b>	%
BRCA1	0.0%
BRCA2	0.0%
ANY	0.0%
<b>TYRER-CUZICK</b>	
BRCA1	0.0%
BRCA2	0.1%
ANY	0.1%
<b>MMRPRO</b>	
MLH1	0.0%
MSH2	0.0%
MSH6	0.0%
ANY	0.0%

- o Risk Reports – Each time you run a risk assessment you can save the resulting report as a pdf file within your database. You can also retrieve previous reports and save them as files outside of the database.

Select and view Risk Reports:

**view Risk Report PDF**

**Pedigree Viewer**

Calculate [gear icon] Delete Report 2016-07-28 09:46 [dropdown arrow]

Validation Errors

Cancer Risk

**BREAST**

BRCAPRO	0.0%	11.9%
TYRER-CUZICK	0.1%	26.1%

**OVARIAN**

BRCAPRO	0.0%	1.6%
---------	------	------

**COLORECTAL**

**Risk Alice 8/2/16**

**click drop-down arrow to select previous risk reports**

Save Risk Reports as pdf file on your computer or print a hard copy:

**Risk Report**

**click to print risk report**

risk\_report.pdf 1 / 6 [refresh icon] [download icon] [print icon]

**Risk Assessment Report**

08/02/2016

**click to save risk report as a pdf file**

Download

Example, Alice  
Date of Birth : 05/19/1971  
MRN : 10202837

**Cancer Risk**

COLORECTAL	5 Year	Lifetime
MMRPRO	0.1%	3.3%

ENDOMETRIAL	5 Year	Lifetime
MMRPRO	0.1%	1.9%

MELANOMA	5 Year	Lifetime
MELAPRO	0.2%	1.7%

PANCREATIC	5 Year	Lifetime
PANCPRO	0.5%	12.7%

- Ordering Genetic Tests – Progeny has integrated the ability to order genetic tests from Ambry Genetics through their Ambry Port system. Through Progeny Web users can:
  - complete an insurance Pre-Verification form,
  - order genetic tests,
  - check the status of orders,
  - view the genetic test results report,
  - save the genetic test results report as a file on your computer,

all from within the Progeny software, eliminating the necessity to switch to another application for these tasks.

- o Registering – In order to use this feature clinicians should complete the quick registration form at <http://www.progenygenetics.com/support/ambryorder>.

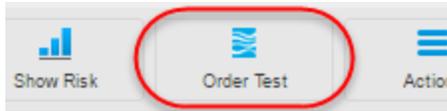
*Registration form for Progeny AP2 credentials:*

First Name   
 Last Name   
 Degree   
 Institution   
 Address   
 City   
 State/Province   
 Postal Code   
 Country   
 Email   
 Phone   
 Progeny Customer Number   
 I'm already registered on AmbryPort 2.0  
 Ambry Customer Number   
 Comments

Within a day you will receive credentials for ordering genetic tests from within Progeny. Please contact Progeny Support at [support@progenygenetics.com](mailto:support@progenygenetics.com) for assistance inputting your credentials into Progeny.

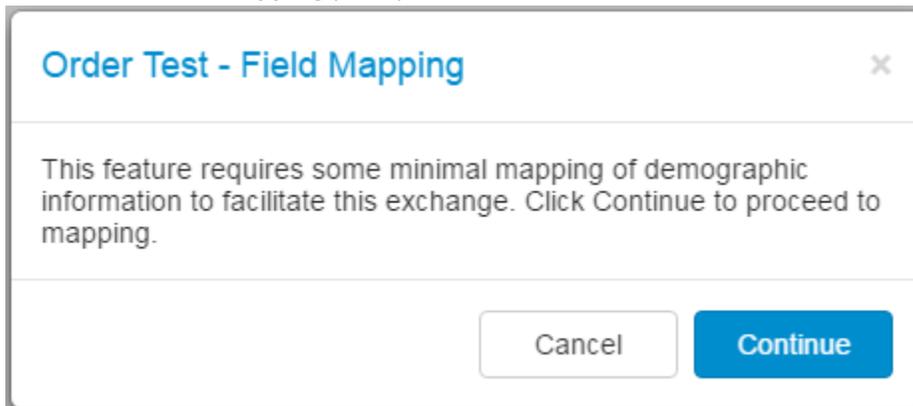
- Configuring Progeny – Before you place your first order, a few fields must be mapped to your database so the test can be associated with a patient. This is a one-time process. From a pedigree select the individual who you would like to order a test for, then click the **Order Test** button.

**Order Test** button:

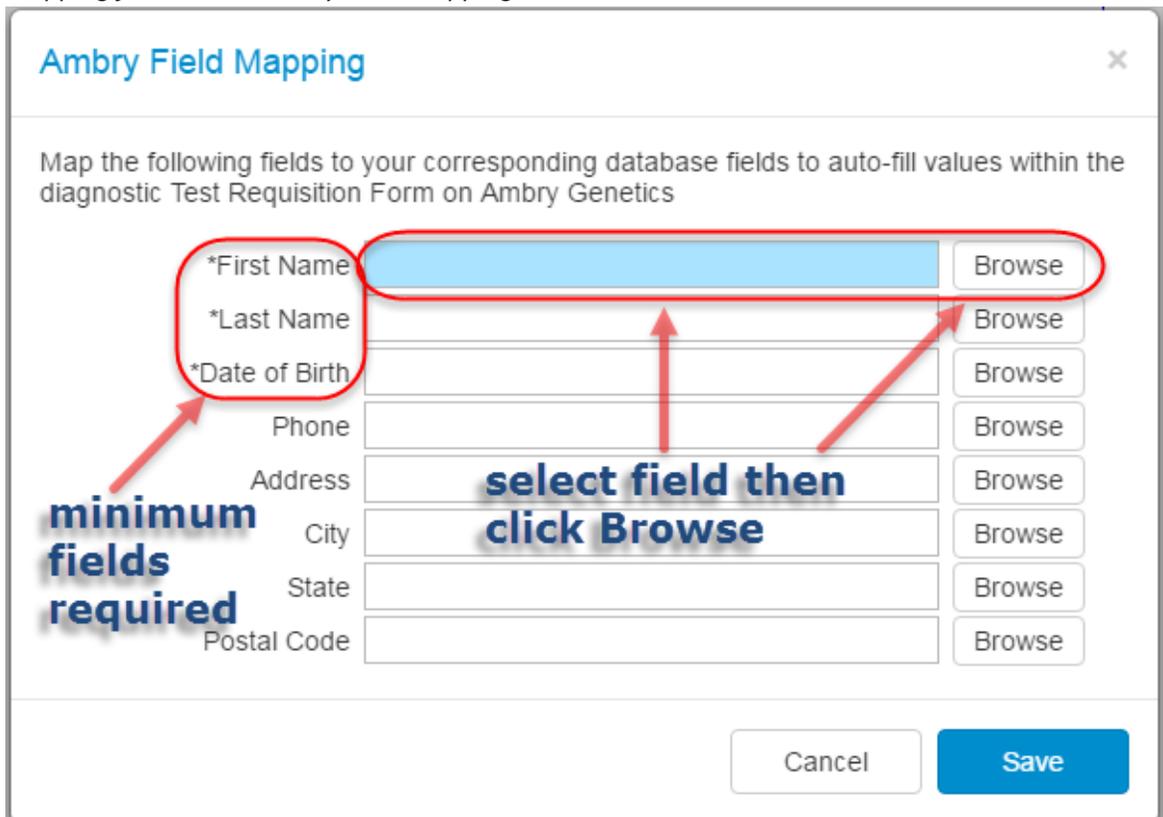


Click **Continue** at the field mapping prompt.

**Order Test - Field Mapping** prompt:

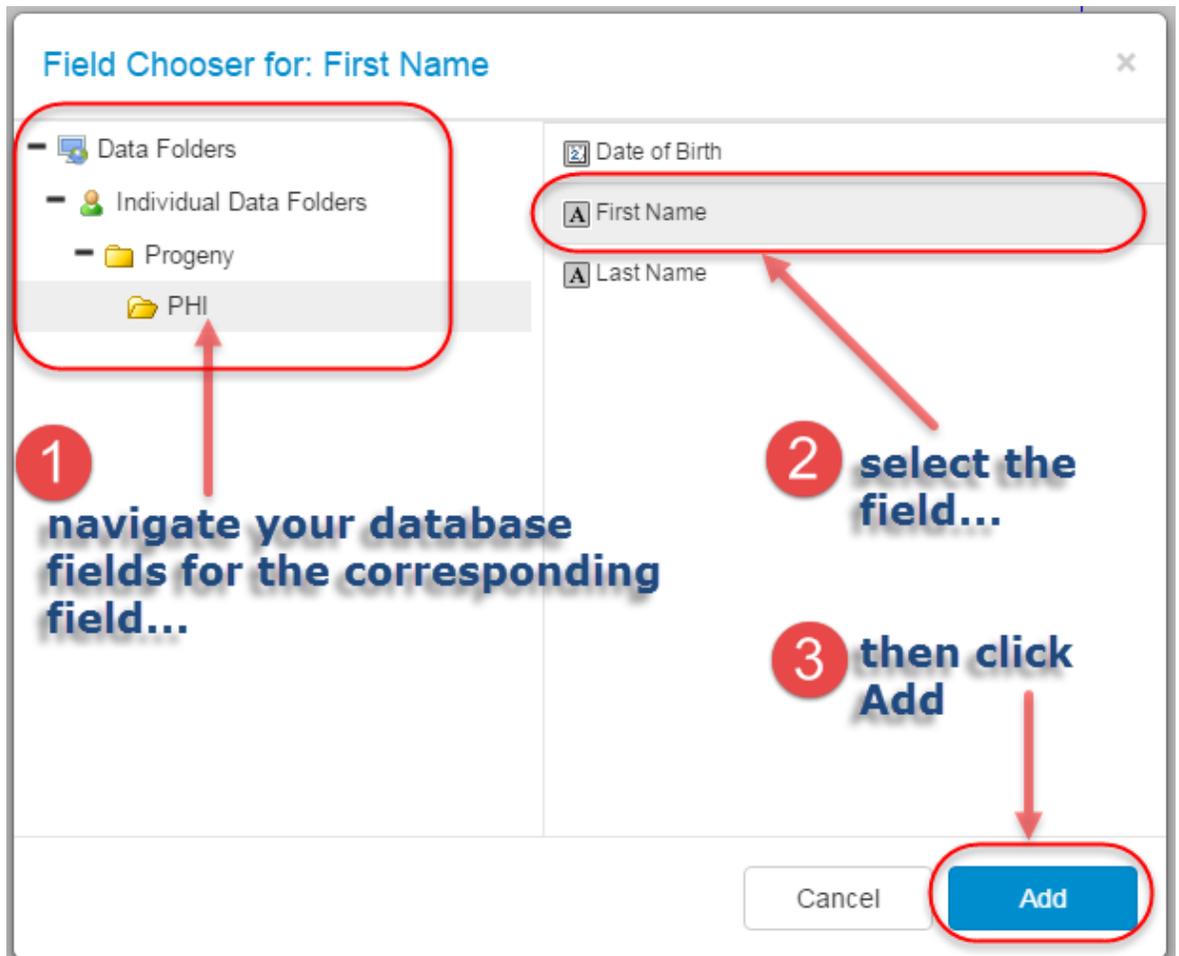


Mapping fields in the Ambry Field Mapping screen:



Click the **Browse** button to navigate your database fields for the corresponding field then click **Add**. Do the same for the remaining fields.

*Field Chooser screen:*



When finished, click the **Save** button on the **Ambry Field Mapping** screen.

*Saving your field mappings:*

**Ambry Field Mapping** **fields mapped** ×

Map the following fields to your corresponding database fields to auto-fill values within the diagnostic Test Requisition Form on Ambry Genetics

*First Name	Name: First	Browse
*Last Name	Name: Last	Browse
*Date of Birth	Date of Birth	Browse
Phone	Phone - Preferred	Browse
Address	Address	Browse
City	City	Browse
State	State	Browse
Postal Code	Zip Code	Browse

**click save** Cancel **Save**

- Ordering Tests – After you have received your AP2 credentials and have the field mapping configured you are ready to place genetic test orders. Just select an individual on the pedigree you want to order a test for and click the **Order Test** button as shown above. The selected individual’s information will be populated into the mapped fields and a current view of the pedigree which will accompany the **Test Request Form (TRF)** will be displayed.

*Order Test – Patient Confirmation screen:*

**Order Test - Patient Confirmation** ✕

You have selected to order tests for the individual highlighted in yellow below. Verify your data before proceeding. By continuing, you will be leaving the Progeny application and going to a secure web-based application operated by Ambry Genetics for the purpose of ordering laboratory services for the individual you have identified. Please note that only the data shown below will be transferred to Ambry Genetics for purposes of treatment, payment and health care operations.

\*Organization:

\*First Name:

\*Last Name:

\*Date of Birth:

Phone:

Address:

City:

State:

Postal Code:

Editing the information above will update the corresponding data fields within Progeny.  
Click below to modify mapped fields.

**Alice Test**  
8/2/16

Breast

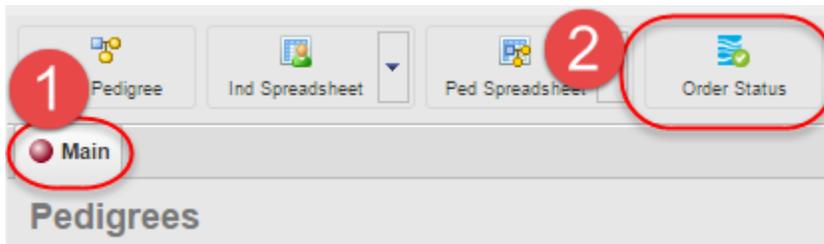
Ovary

Pancreas

- Preverification Form – In order to assist in expediting insurance processing, click the **Continue with Preverification** button and complete the requested information. The status of benefits will be verified by Ambry Insurance Verification Department for all insurance samples before processing. Otherwise click the **Continue with Order** button to complete the **Test Request Form (TRF)**. Validation requisites will be displayed in the left column of the TRF.

- Order Status – After you have placed an order you may check its status and, when completed, view its results on the **Orders** screen by clicking the **Order Status** button from the Progeny **Main** tab as shown below.

**Order Status button:**



**Orders screen:**

Actions	Order ID	Accession #	Patient	DOB	Panel	Test	Organization Name	Status	Submission Date	Results
	<a href="#">P198411</a>		Sean John	02/10/2016			PROGENY TEST ORG 1 (17245)			
	<a href="#">P198413</a>		Sean John	02/10/2016			PROGENY TEST ORG 1 (17245)			
	<a href="#">P198414</a>		Ron Smith	11/10/1974			PROGENY TEST ORG 1 (17245)			
	<a href="#">P198416</a>		StepMom1 Smith	03/31/1972			PROGENY TEST ORG 1 (17245)			
	<a href="#">P198417</a>		Sean John	02/10/2016			PROGENY TEST ORG 1 (17245)			
	<a href="#">P198524</a>		Ro JKhf	03/05/2013	1048	HBB sequencing & del/dup	PROGENY TEST ORG 1 (17245)	Submitted	03/09/2016	
	<a href="#">P198526</a>		Cherry Test	02/27/1997			PROGENY TEST ORG 1 (17245)			
	<a href="#">P198529</a>		Ro JKhf	03/09/1980	8836	BRCAplus	PROGENY TEST ORG 1 (17245)	Submitted	03/09/2016	
	<a href="#">P198549</a>		Ro JKhf	03/09/1980	8836	BRCAplus	PROGENY TEST ORG 1 (17245)	Reported	06/20/2016	
	<a href="#">P198549</a>		Cherry Test	03/09/1980	8838	BRCA1/2 seq and del/dup	PROGENY TEST ORG 1 (17245)		06/20/2016	

- Progeny Support - For assistance with your Progeny software please contact Progeny Support:

Phone: **(800) 776-4369** – 8 AM until 5 PM Eastern Time

Email: [Support@ProgenyGenetics.com](mailto:Support@ProgenyGenetics.com)

Mailing Address:

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 190 Congress Park Drive, Suite 140  
 Delray Beach, Florida 33445