Generating External Pedigree Links in Progeny Web
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Getting Started

The External Link function in Progeny Web allows users to create a hyperlink to a pedigree which can be embedded in an outside application or sent to another user. When clicked, this link will bypass the rest of the Progeny application and display a static image of the chosen pedigree.

Please contact Progeny Support at 1-800-PROGENY or support@progenygenetics.com with any questions or problems in deploying this feature.

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Configuration
The first step in setting this feature up is to create and assign a user account to function as the gateway into the database.

1. Access the Progeny Web Configuration screen via the secured configuration URL (click HERE for instructions on accessing the Progeny Web Configuration).

2. Log into the configuration menu using the ‘config’ username and assigned password.
   a. If a custom password has not been set up the default password is ‘internal’.

3. Once logged in, click on the Web Configuration Parameters button. Scroll about halfway down the options list until the EMR_PASSWORD and EMR_USERNAME options are visible:

4. Within the Progeny database create a user account called ExtURL and assign a password. Make sure the Enable Web Client Access box is checked for this account.
   a. If desired, create a User Class for this account as well and adjust the internal Progeny field security parameters to restrict access to identifiable data.

5. Verify by logging into the Web Client that this account is able to access Progeny Web and view the pedigrees that external links will be generated for.

6. Back in the Progeny Web Configuration, within the Web Configuration Parameters module enter the username and password for this user account in the EMR_PASSWORD and EMR_USERNAME fields. Click to another option (does not matter which) to commit the entered values then exit the configuration menu.
Deployment
There are three (3) options for deploying the External Link feature – manual, batch and automatic. The automatic method requires setup and configuration of Progeny’s Proxy Tables feature, a premium option which allows the Progeny database to both communicate and integrate with an EMR or other database application (available for an additional fee).

Manual Deployment
The Manual Deployment method will generate external links to pedigrees one at a time.

1. Log into the Web Client and locate the pedigree to generate the External URL.
2. From the Main Screen right-click on the pedigree or left click the green plus button to the left of the pedigree to open the context menu.
3. Within the context menu choose the Generate External Link option:

4. A popup window will appear pre-populated with a customized URL (see below) – this URL can be copied into another application, email, document or whatever else you choose:
**Batch Deployment**

The Batch Deployment method allows External Links to be generated for a group of pedigrees at the same time – this will require the generation of a Pedigree Spreadsheet within Progeny along with access to Microsoft Excel or a similar spreadsheet application.

1. Log into the Progeny Desktop Client and select the **Fields** Module.
2. Create a **Pedigree-level** computed field called Pedigree ID.
   a. In the Computed Field Definition enter the following: `st_family.familyid`
   b. Click the **Add** button at the bottom then close the New Field window.
3. Go to the **Pedigrees** Module and from the main menu select **Create New Pedigree Spreadsheet** button:

![Pedigrees Module](image)

4. In this Pedigree Spreadsheet add the **Pedigree Name** field from the System Fields folder then add the **Pedigree ID** field created in Step 2. Run the spreadsheet.
5. Once the full spreadsheet has loaded click the **Export** button. Choose the **Text (Comma Delimited)** format option, leave all checkboxes unchecked then click the **Export** button. Save this file to your Desktop, then open it in Microsoft Excel.
6. Within the Excel spreadsheet the Pedigree Names should be in Column A and the Pedigree IDs should be in Column B. At this point some information about the Web Client connection is required – the following items will be used in next steps:
   a. `{MYIP}` = the full URL (including HTTP:// or HTTPS://) of the Progeny Web Client
   b. `{MYCONN}` = the Connection value displayed in the dropdown box below Username and Password on the Progeny Web Client login screen
      i. In the screenshot below taken from Progeny's public demo database ([http://3mil.progenygenetics.com/v9](http://3mil.progenygenetics.com/v9)), `{MYCONN}` would be ‘demo9’:

![Progeny Web Client Login](image)
7. In the Excel spreadsheet, enter the following into cell E1: `{MYIP}/PEDIGREE?id=
   a. Using the Progeny public demo database as an example, this would be: 
      http://3mil.progenygenetics.com/v9/PEDIGREE?id=

8. Enter the following into cell E2: `&conn={MYCONN}`
   a. Using the Progeny public demo database as an example, this would be: &conn=demo9

9. Click on cell C1 and enter the following formula (including the equals [=] sign):
   a. `=CONCATENATE($E$1,B1,$E$2)

10. Copy cell C1 and paste it into Column C for every spreadsheet row where data exists in Columns A and B – the end result should look like the following screenshot:

   ![Excel Spreadsheet Screenshot]

11. This data can now be copied/pasted into EMR records or another application.

**Automatic Deployment**

This final method of implementing External Links requires the optional Proxy Tables feature to function. This involves creating a remote field in the EMR to pull the Pedigree ID field created in Step 2 of the Batch Deployment method then concatenating it into a hyperlink within the EMR. For information on the Proxy Table feature please contact Progeny Support at 1-800-PROGENY or support@progenygenetics.com