



CHART Instructions

Prepared by the Training Team

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CHART quick guide

More detailed instructions are provided in the remainder of this booklet.

1. Check whether CHART is already installed on the computer you are using. If it is, jump to step 5.
2. If CHART is not installed, ensure that MS Excel is configured before installation. Open MS Excel, then within the macro settings select 'Disable all macros with notification' and ensure the 'Trust access to the VBA project object model' box is ticked.
3. [Register](#) with PRIMIS (if you have not already done so). Then log in to the [PRIMIS Hub](#) and navigate to the [CHART area](#).
4. Click on the blue CHART box to start the download. Follow the installation wizard.
5. Open CHART by double-clicking on the CHART shortcut icon that was placed on your computer desktop during the installation process. Read and agree to the confidentiality warning message.
6. Configure CHART by clicking on the 'PRIMIS CHART' menu, then 'Configure'. The minimum information required is the Practice ID and GP system within the 'Set Up' tab. We also recommend checking the three file paths within the 'File Paths' tab.
7. Download the required CHART query libraries by clicking on the 'Check for updates before running audits' link on the CHART home page.



[Check for updates before running audits](#)

Enter your PRIMIS Hub login (email address) and password when prompted.

8. Once completed, find the internet browser window that has opened. This lists the query libraries available to download and the latest CHART version number. If you do not have the latest version of CHART installed. We recommended updating this first.

To either update CHART or download a query library, click on the 'Download' button in the 'Action' column. The download should start automatically.

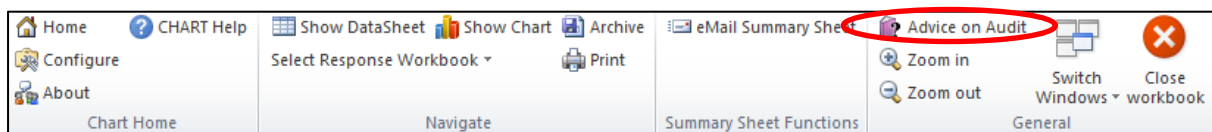
If you have a pop-up blocker installed, you may need to right click on the yellow banner that appears and select 'Download File...':

You will be asked if you want to run or save the installer file, click 'Run'. Follow the installation wizard.

9. Repeat step 8 if you wish to install more CHART libraries. Use the Reset CHART button in the CHART toolbar to refresh the list of audits you have just installed.
10. Prepare your queries by selecting the audit from the first drop down box. Click on the second drop down box to see how many topics are contained within. If you require all topics within an audit, select 'All topics in audit'.
11. Using Windows Explorer, navigate to the folder where the queries will be copied (e.g. C:/CHART/QQQ) and ensure that the folder is empty.
12. Click 'Create queries to run'. Choose between pseudonymised or patient identifiable queries. If you want both named AND pseudonymised queries to run at the same time, simply repeat this step.
13. The queries now need to be run through the MIQUEST Interpreter on the practice clinical system. Refer to the specific GP clinical information system [MIQUEST instructions](#) for that system.
14. To load the responses into CHART, make sure you are on the home page of CHART and that you have placed the csv files from the clinical system MIQUEST interpreter into the correct response folder for CHART (e.g. C:\CHART\RRR).

On the right hand side of the screen, click 'View your practice results'. If your responses have been saved into the correct response folder you will be able to see your audit report(s) listed. Highlight the report(s) you want (use the Ctrl key to highlight multiple selections) and then click 'Select'.

15. Your audit report(s) should now load and you can navigate through your results. If there is a detailed audit report instructional guide available for your chosen audit tool, you can access it by selecting 'Advice on audit' from the CHART toolbar.



Full instructional guide

Registering with PRIMIS

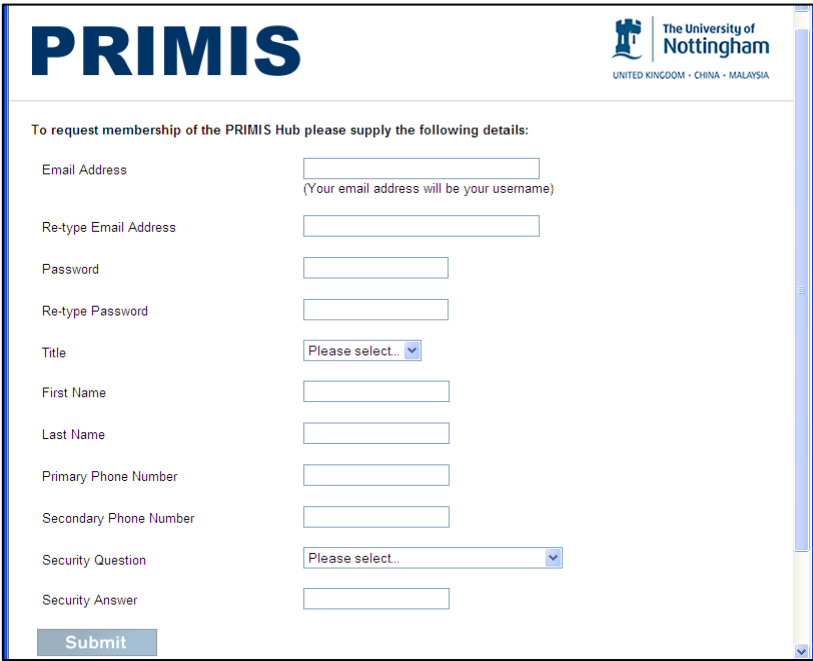
In order to download the CHART software you need to register for basic membership of PRIMIS Hub.

Please note if you are already registered with PRIMIS as a Basic or Full Hub member you do not need to register again, simply log in.

If you have forgotten your password	If your email address has changed
<p>Please visit the following page to reset it:</p> <p>https://www.primis.nottingham.ac.uk/registration/password_generation/default.asp</p> <p>There is also a reset password button on the home page of the PRIMIS website.</p>	<p>Please email us at: enquiries@primis.nottingham.ac.uk and we will make the necessary changes to your account.</p> <p>We ask that you do not re-register, as this will create a second account that will not be set up with the products and services that you've previously been granted permission to access</p>

To register for free basic membership visit:

<https://www.primis.nottingham.ac.uk/registration/registration/default.asp> and complete the form to create your user name and password.



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To request membership of the PRIMIS Hub please supply the following details:

Email Address
(Your email address will be your username)

Re-type Email Address

Password

Re-type Password

Title

First Name

Last Name

Primary Phone Number

Secondary Phone Number

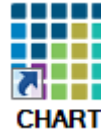
Security Question


Security Answer

Your email address will become your username therefore please enter it carefully as it will be used to send you confirmation messages. Follow the instructions in any emails we send you regarding your registrations or new password.

Preparations

1. Check to see if CHART is already installed:
 - a. Is this icon on your desktop?
 - b. Does CHART appear in your start menu?
 - c. Do you have CHART as a programme file in your control panel?
 - d. Do you have a CHART folder on your C drive?
2. If CHART is already installed then you can then proceed to page 8 'Opening CHART for the first time'.
3. If CHART is not installed you need to make sure that MS Excel is configured properly before you install it. Open MS Excel on your machine then, depending on your version, follow the instructions below:



Excel 2007	Excel 2010
<p>Click on the Microsoft Office button in the top left of the screen</p>  <p>Select Excel Options > Trust Center > Macro Settings</p>	<p>Click on the File menu</p> <p>Select Options > Trust Center > Trust Center Settings > Macro Settings</p>
<p>Select 'Disable all macros with notification'</p> <p>Tick the 'Trust access to the VBA project object model' box</p> <p>Click 'apply'</p> <p>Click 'OK'</p>	

You may see a popup message '**Runtime error 438 Object doesn't support this property of method**' when you open CHART. Microsoft have released a fix for the problem which was caused by their faulty security update. Details are available on the Microsoft support website.

The recommended solution is to use **Microsoft Fix it 51031**, which must be run by a user with administrator rights and should resolve the problems for all users. Where that is not possible **Microsoft Fix it 51029** may be run to fix the problem for the current user.

Downloading and installing CHART

1. Log in to [PRIMIS Hub](http://www.primis.nottingham.ac.uk/hub/login/index.php)
<http://www.primis.nottingham.ac.uk/hub/login/index.php>
2. Click on the blue CHART box in the top left corner (highlighted below):



3. Click on the 'CHART installation file download now' box:



4. You will now have a pop-up asking if you wish to run or save the file. Save the file to a location that you can easily remember. Locate the installer file and double-click it to start the setup wizard. Follow the instructions and CHART will automatically install at the following location C:\CHART\ .This is the preferred location for CHART; it is recommended that you don't change this. If your C: drive is locked for access then you will need to find an alternative location.
5. When completed, a CHART shortcut will appear on your desktop that looks like this:



Opening CHART for the first time

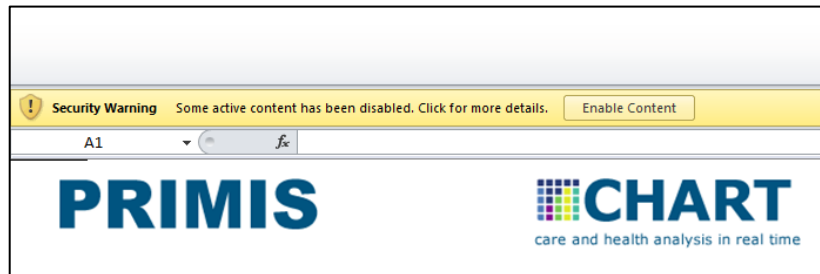
Open CHART by double-clicking on the CHART shortcut that was placed on your computer desktop during the installation process, or using Windows Explorer, browse to and open the folder C:\CHART\ on your PC. Inside you will see a file called CHART.xls. Double click on this to open CHART.

Excel will open and you may be presented with an error if you haven't configured Excel correctly. If either of the following messages appears:

- Run time error '1004' Programmatic access to Visual Basics Project is not trusted
- Run time error '438' object doesn't support this property or method

Return to page 6 'Prepare your PC for using CHART'.

Click on 'Enable Content'

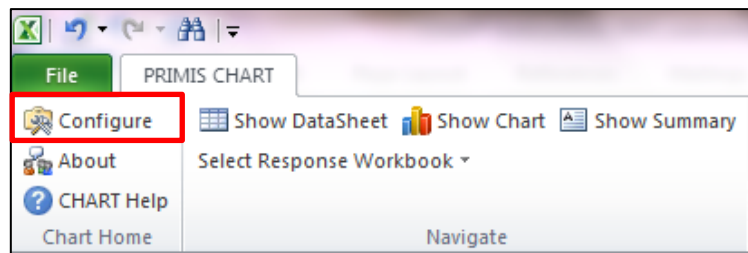


Next you will receive a confidentiality warning message. Read this message and click 'I AGREE' to accept the terms of use:

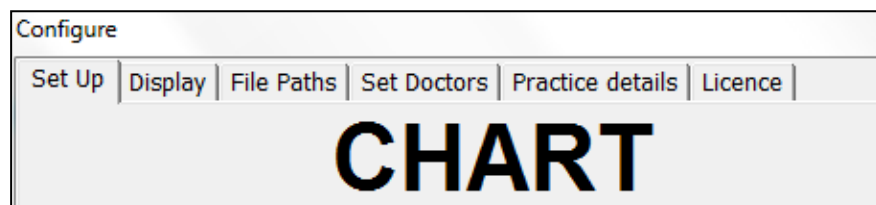


Configure CHART for first use

Select 'PRIMIS CHART' from the Excel menu bar and then select 'Configure'.



You will see six tabs:



Within the table below the '**Fields to be completed**' must be completed before CHART is used in order to prevent any problems.

Please note: If any of the pre-populated fields are blank you will need to uninstall and then reinstall CHART.

Tab	Fields to be completed	Pre-populated field(s) that can be ignored
Set Up	<p>Practice ID code This should be your practice National ID Code e.g. H12345.</p> <p>GP System You must select your practice clinical system from the drop down list.</p> <p>**If these are not correct the queries will not run on your clinical system.</p>	<p>Reference Date Defaults to today's date. You can set this date to past and future references if you wish, in which case queries will look back from that date.</p> <p>Query agreement Local</p> <p>Enquiry Identify Local</p> <p>Delete redundant columns Always ticked</p> <p>Data sheet filter Always ticked</p>
Display		<p>By clicking on a colour you will get a colour menu where you can select your preferred choice of colour scheme. You can also use the drop down box to choose which item will display when viewing responses. Remember to click on the 'Apply Selection' to save your preferences.</p>

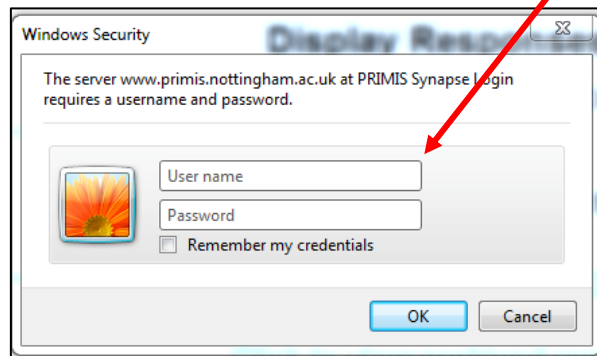
Files Paths	<p>Query Delivery Directory This defaults to C:\CHART\QQQ but you can browse and select any network drive that has been mapped to your PC. You must select a specific folder for the queries to be copied to. The home page of CHART will display the file path you have chosen.</p> <p>Response File Directory This defaults to C:\CHART\RRR but you can browse and select any network drive that has been mapped to your PC. You must select a specific folder for the responses to be picked up from. The home page of CHART will display the file path you have chosen.</p> <p>Archive Directory This defaults to C:\CHART\Archive but you can change this by browsing and selecting any network directory. The CHART software will automatically create an Archive folder for the responses to be placed into. Archived responses will be prefixed with the date they were run, and placed into a sub folder for that query library, for easy reference for example: C:\CHART\Archive\GRASP_AF\GRASP-AF Report (Named) ©UoN 2015</p> <p>For instructions on how to map a network drive, please refer to the MIQUEST instructions for your clinical system.</p>	
Set Doctors	<p>Only relevant if you share a local server with another practice. Does not apply to hosted clinical systems.</p> <p>Click on 'New' and then enter the name, initials and national ID number for the GP. Then click on 'Accept' to save these details. You should repeat this for each GP.</p> <p>Now tick the 'Shared Server' box. This will now only create responses for the GP's you have set up. Any other GP's will be ignored by the queries. You can tick the 'Swap initials for National ID No.' to change the GP's ID number in the data sheet to the initials you set up so that it is easier to identify the GP.</p>	
Practice details	<p>If completed, the following fields will show on your summary reports, but these are not mandatory:</p> <p>Practice Name Address Postcode Contact Telephone E-mail Organisation</p>	<p>Read Code Set 9999R2 for Read Version 2 9999R3 for CTV3</p> <p>PRIMIS Unique ID Always leave this field blank</p> <p>Scheme ID Always leave this field blank</p> <p>WebDav Always ticked to allow aggregated data to be sent to CHART Online, should the practice wish</p>

Licence	This is for administrative purposes only. This can help us diagnose or troubleshoot any problems that you are experiencing with CHART.
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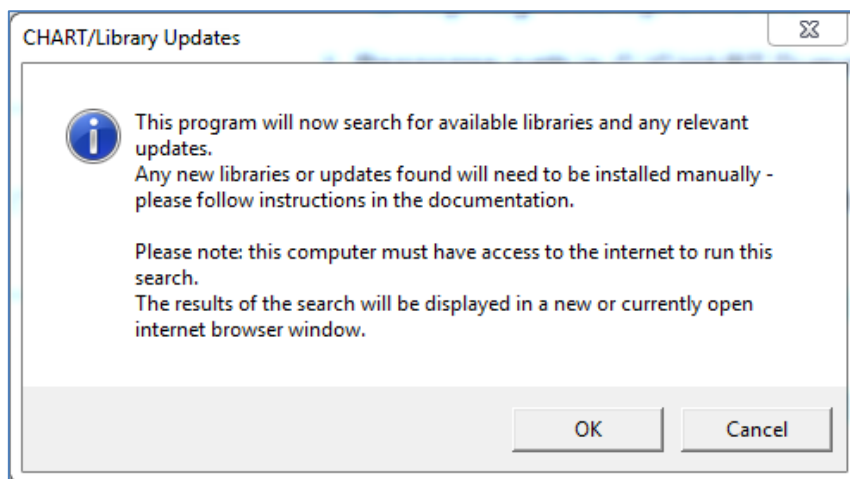
After making any changes, click on OK to return to the CHART homepage. **You are now ready to start using CHART.**

Downloading and installing CHART query libraries

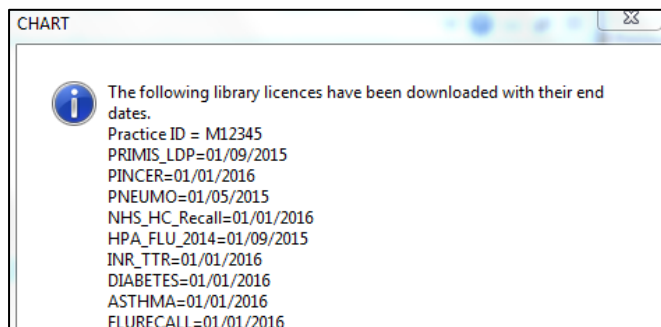
1. Open CHART.
2. Click the 'Check for updates before running audits' link on the home page.
3. The following box will appear. Enter your PRIMIS Hub login (email address) and password.
4. Click OK.



5. The following text box will appear - click OK.




6. A download summary will appear (click OK) and a new internet browser window will have been opened on your computer:




If you encounter any problems with the 'check for updates' facility ensure that both your practice ID code and clinical system have been entered correctly in the CHART configuration settings.

The internet browser screen that opens will confirm which version of the CHART software you have installed, whether this is the latest version and which query libraries are available for you to download:

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CHART Software & Library Status

This page shows a snapshot view of the status of your installed CHART software and libraries.
To refresh the status after updating CHART or any libraries, please check for updates again from within CHART.

User details: basic.member@primis.nottingham.ac.uk Practice code: M12345 Clinical system: InPs Vision 3

Excel Version	CHART software	Installed Version	Latest Version	Status
97-2003	CHART 2003 Generic V2 (5 byte)	2.0.180	2.0.180	✓

CHART query libraries, together with their associated CHART Online toolkits, software, and code are the property of the University of Nottingham or its licensors and all use thereof is governed by their respective terms and conditions and/or licence agreements. By downloading the query libraries, you acknowledge that you have reviewed and accepted those terms.

Query Library	Library Expiry	Availability	Licence Expiry	Installed Version	Latest Version	Status	Action
Atrial Fibrillation (AF) Casefinder	Library now included in the GRASP-AF library						
GRASP-AF	30 Jun 2015	GRASP users	01 Aug 2014	Not installed	5.0.0	!	Download
GRASP-COPD	31 Jul 2014	GRASP users	01 Aug 2014	Not installed	1.1.2	!	Download
GRASP-HF	30 Jun 2014	GRASP users	01 Aug 2014	Not installed	1.0.1	!	Download
Warfarin Patient Safety	30 Jun 2015	All members	01 Aug 2014	1.0.1	1.0.1	✓	

Green ticks indicate that you already have the latest version installed

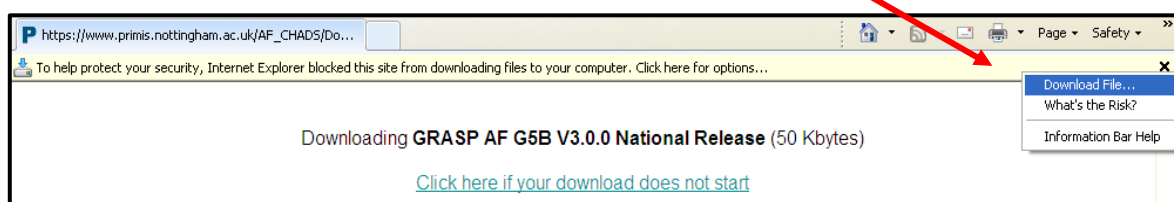
Red crosses indicate that your version needs to be updated

Orange exclamations show that you have not yet installed the library

The list of libraries that you see is determined by your level of PRIMIS Hub membership (full or basic), whether you have been granted access to any additional GRASP tools and whether your practice has purchased any individual libraries.

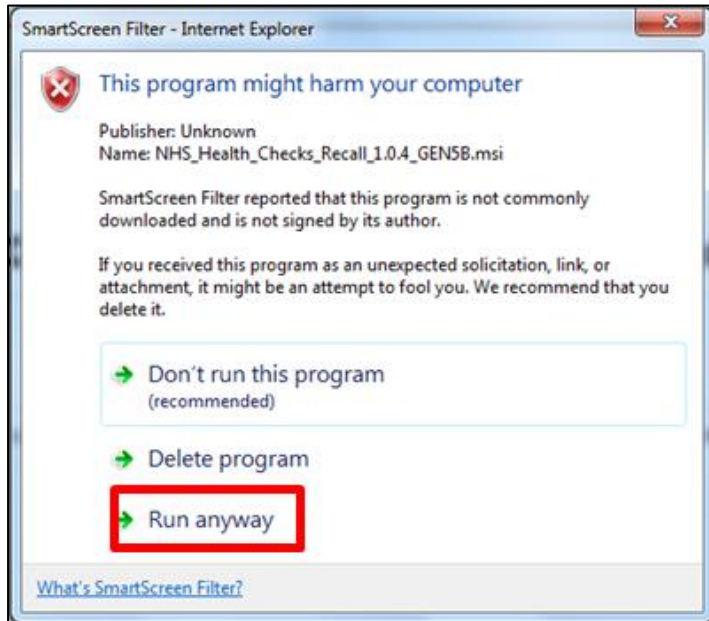
Click the 'Download' button in the 'Action' column for the query library you want to install. The download should start automatically.

If you have a pop-up blocker installed, you may need to right click on the yellow banner that appears and select 'Download File...':



You will be asked if you want to run or save the installer file, click 'Run'. A pop up box may appear asking if you are you sure you want to run this software. Click 'Run' and follow the install wizard instructions on the screen.

Depending on the version of Internet Explorer you are using you might be presented with a pop-up asking you to confirm installation. You will need to select 'run' or 'run anyway' for your download to commence.



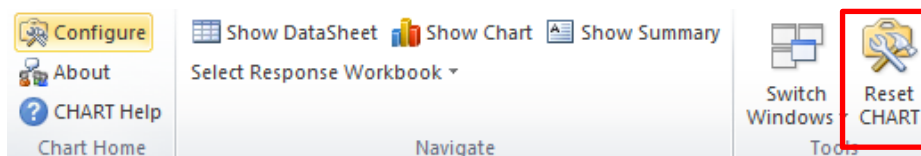
If your installation seems to stall, check that your anti-virus/firewall software has not opened another window and is waiting for confirmation before proceeding with the installation.

The query library will automatically be installed on the C:\ drive in a folder named CHART.

- Click on 'Next' and then 'Install'.
- When prompted click on 'Finish'.

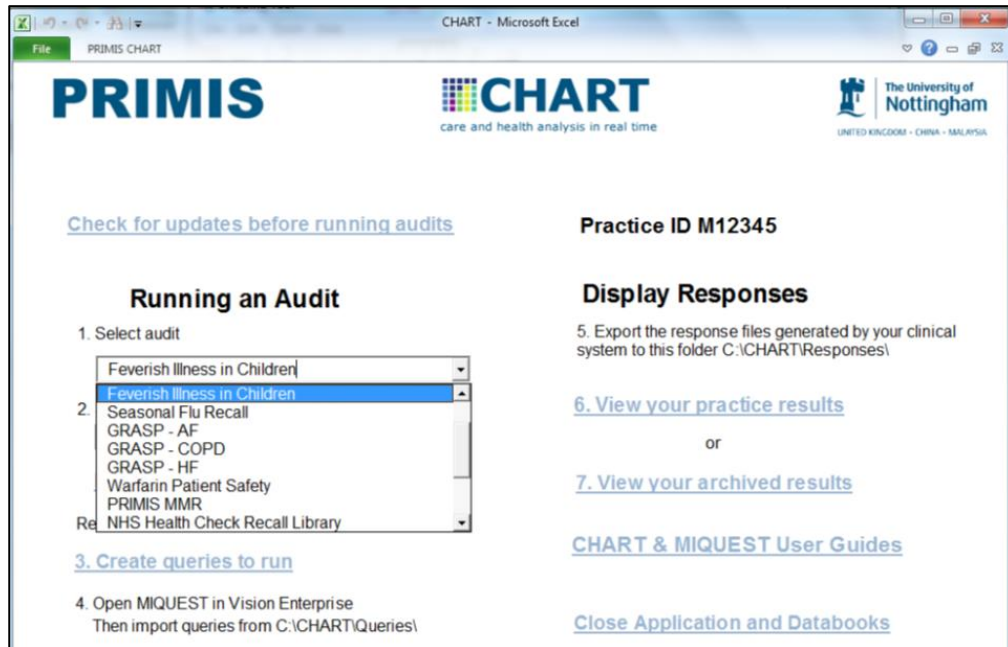
You can repeat the above steps to install more CHART libraries. Once you have finished installing, close your internet browser window and navigate back to CHART.

Upon navigating back to CHART, you will need to use the 'reset CHART' function to refresh the list of audits you have just installed.



Preparing queries in CHART

1. **Select audit.** On the CHART home page select a query library from the drop down box on the left hand side of the screen:



2. Some query libraries only have one topic. Some have multiple topics. **Click on the second drop down box** to see how many query set topics there are for your chosen query library. For example, GRASP-AF contains both an AF case finder set and an AF care set of queries:

1. Select audit

GRASP - AF

2. Select topic to run

All topics in audit

If you wish to run all sets within a library you must ensure that the second box reads **'All topics in audit'**

Using Windows Explorer, navigate to the folder where the queries will be copied (e.g. C:/CHART/Queries) and ensure that the folder is empty. If there are existing queries there, delete these before the next step. It is good practice to keep this folder empty.

3. Click **Create queries to run**. You will then be prompted to choose between running patient identifiable queries or pseudonymised queries. Both queries bring out the same clinical information for patients. However, in the datasheet:

- Patient identifiable** queries include the patient's surname, forename, date of birth/age, patient's computer number and GP number.

This level of information is necessary for audit purposes and close examination by practice staff.

Gp	Pract_Number	Surname	Forename
G4422448	02JA	GREEN	THERESA
G5225550	04PO	JONES	CLIFFORD
G7722774	08LQ	THOMAS	BRIAN
G7722774	5Q2T	LEWIS	SARAH

- Pseudonymised** queries only show a pseudonymised patient id and age.

It is much harder to identify individual patients and should therefore be used when it is not necessary to identify patients (e.g. for comparative analysis).

Reference	Age	Sex
0022	65	F
0023	80	M
0034	60	F






Once you have decided whether to run identifiable or pseudonymised queries, CHART will create them at the location you specified as your '**Query Delivery Directory**' (see CHART Configuration settings).

If you want both named AND pseudonymised queries to run at the same time, simply repeat the process. If you run the patient identifiable queries, the responses should be kept secure and not distributed outside of the practice.

4. The queries now need to be run through the MIQUEST Interpreter on the practice clinical system. Refer to the specific GP clinical information system MIQUEST instructions for that system.

MIQUEST running instructions and troubleshooting guides can be downloaded from CHART section within the PRIMIS Hub:

<http://www.primis.nottingham.ac.uk/hub/mod/resource/view.php?id=333>

Name	Size	Modified
 EMISLV MIQUEST Instructions V1.0.pdf	555.1KB	1 May 2012, 10:45 AM
 EMIS PCS Web MIQUEST Instructions V1.0.pdf	2.1MB	31 March 2014, 11:25 AM
 INPSVision MIQUEST Instructions V1.0.pdf	426KB	1 May 2012, 10:45 AM
 MicrotestEvolution MIQUEST Instructions V1.0.pdf	187.6KB	1 May 2012, 10:45 AM
 TPPSystmOne MIQUEST Instructions V1.0.pdf	373.7KB	1 May 2012, 10:45 AM

Loading responses into CHART

1. Make sure you are on the home page of CHART and that you have placed the csv files from the clinical system MIQUEST interpreter into the correct response folder (e.g. C:\CHART\Responses)
2. On the right hand side of the screen, click '**6. View your practice results**'
3. If your responses have been saved into the correct response folder you will be able to see your audit report listed in this window. If your responses have been saved elsewhere, click on the '**Browse**' button and browse to the location of your csv files.

You can load in multiple reports simultaneously by holding down the **Ctrl** key and clicking on the responses to import. Click '**select**' to open the files.

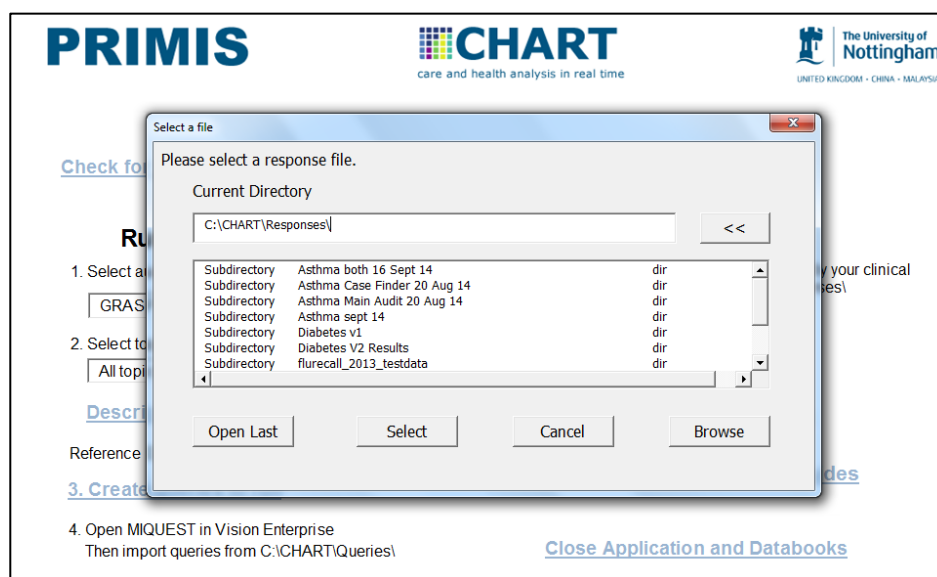
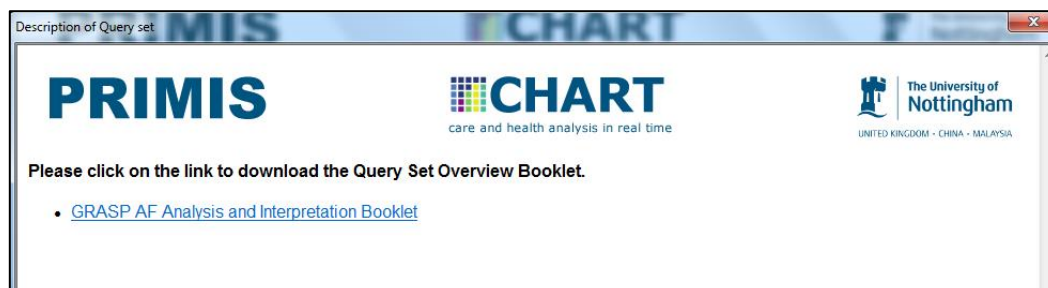


CHART audit tool instructional guides

On the CHART home page, under step 2 there is a link entitled '**Description of audit.**' Clicking this will give you access to any instructional guides (*written for the query library currently highlighted in Step 1*):



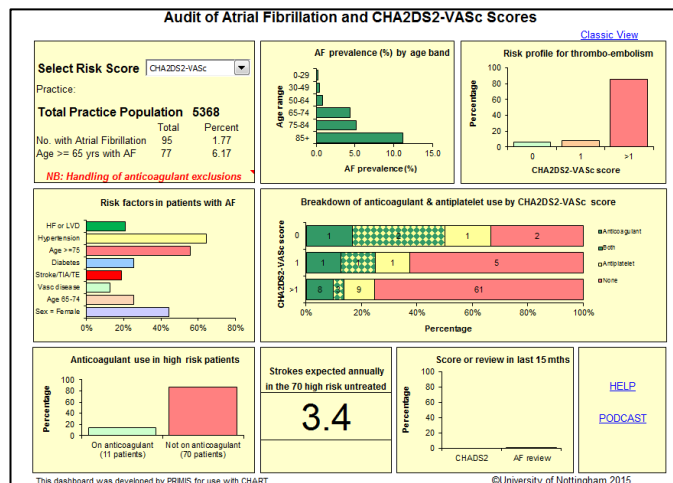
Many PRIMIS audits are now accompanied by a detailed step by step guide to help practices act upon their audit results. They include recommended tasks for practices and useful information on the rationale behind many of the audit features.

Viewing results in CHART

The following section provides an overview of each of the data views within CHART. There are three main ways to view results:

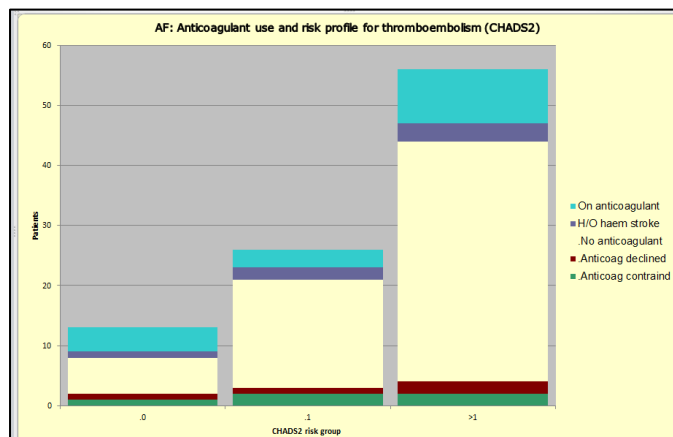
1. The summary sheet

Provides an overview of the information contained in the responses. Some libraries have a dashboard as well as a classic summary sheet. The dashboard shows multiple graphs of different areas of interest.



2. Pre-set graphs

These provide set displays of the data in graphical format. You can drill down on a column in the chart to view the patients who directly relate to that area. Simply click so the bar is selected, then double click. A new worksheet will open up. This worksheet will show you the patients who made up the selected part of the bar chart.



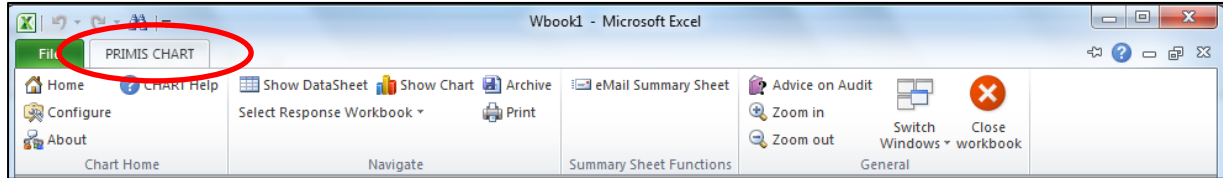
3. The full patient datasheet

The CHART datasheet lists all patients that are included in the audit. Hovering your mouse cursor over a column header gives a brief description of that field. Columns can be filtered as desired by clicking on the grey arrow below the column header.

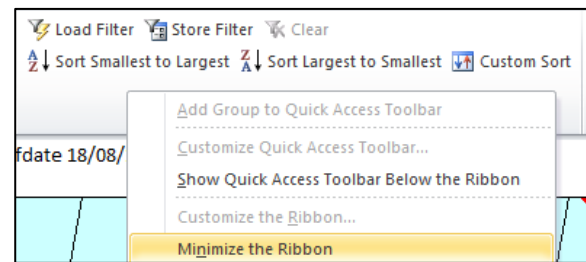
Reference	Age	Sex	Earliest AF code	Earliest AF date	Latest AF code	Latest AF date	Latest AF resolved date	AF resolved status	Latest AF review date in L15M	Latest CHADS2 score in record value in L15M	Latest CHADS2 score in record date in L15M	CHADS2 score	CHADS2 risk category	CHADS2 risk group
01Vn	85	M	G5730	15/12/06	G5730	21/06/07	18/07/11	AF resolved				2	High risk	>1
01Ew	52	M	G573.	06/06/99	G573.	06/06/99						0	Low risk	.0
00va	63	M	G5730	16/12/05	G5732	05/10/06	01/06/06					1	Medium risk	.1
00ri	77	M	G573.	11/04/94	G573.	11/04/94	11/04/94					2	High risk	>1
0001	93	M	G573.	09/11/94	G5730	17/04/08						3	High risk	>1
02AY	76	M	G5730	02/07/05	G5730	02/07/05						4	High risk	>1
028E	81	F	G5734	05/05/05	G5734	05/05/05						3	High risk	>1
012l	89	F	G573.	28/09/01	G573.	28/09/01				0	06/09/13	4	High risk	>1

CHART toolbar

The query responses will always load with the summary sheet showing first. It is important to understand how to navigate between the different sections. The following toolbar appears whenever you click on the '**PRIMIS CHART**' menu header:

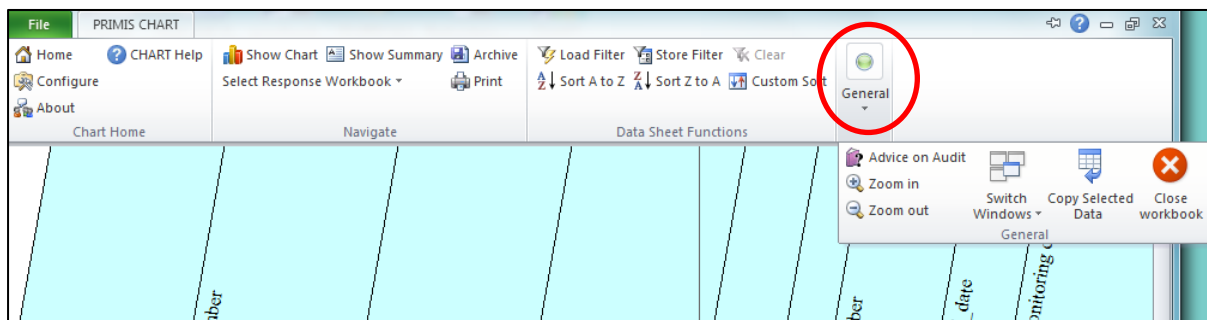


You can make this toolbar permanent by right clicking it and unticking 'Minimize the Ribbon' (see right).



The functions present on the toolbar will change depending upon which view of the data is currently being displayed (i.e. the graph view will have different functions to the datasheet view). A full list of the range of functions can be found within a table in the appendix of this guide.

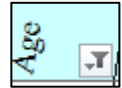
If Excel is operating in a **minimised state** (or reduced resolution), the toolbar may also minimise by placing some functions within a 'General' dropdown list. You will need to click on this in order to access the full range of functions. Alternatively, maximise your viewing screen:



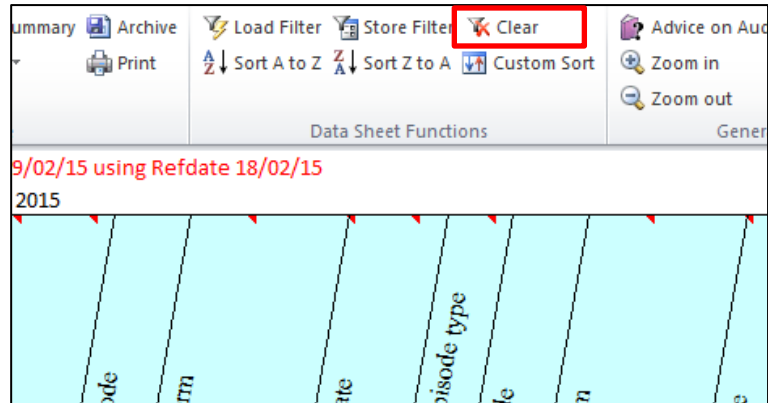
How to filter in CHART

You can use MS Excel filtering functionality to search the datasheet using your own criteria. For example if you select the grey box with the arrow on the Patient Age column, you will then be able to filter on patients who meet a specific age criteria, e.g. over 65 years old. You can continue to filter on any further columns to create the patient list you require.

Once you have applied a filter to an individual column, a filter icon will appear at the top of that column (see right).



Remember to remove all filters when you have finished. The quickest way to remove multiple filters is to select the 'Clear' button from the 'Data Sheet Functions' part of the CHART toolbar.



Loading and saving filters

In CHART you can save your own bespoke filters to load them at a later date. This is useful if you use them repeatedly.

To store a filter:

- **Apply the filter(s)** you wish to save in the datasheet view
- Click on the **PRIMIS CHART menu** and select '**Store Filter**'
- Fill in a description of the filter
- Click '**Save**'

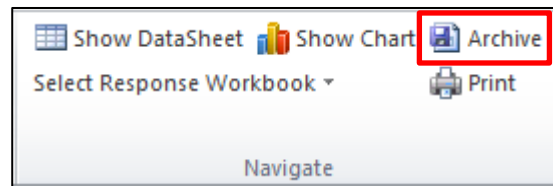
Some query libraries will have pre-loaded filters. You can either use these, or clear them and create your own.

To load a pre-set or saved filter

Click on the **PRIMIS CHART menu**, select 'Load Filter'. Highlight the required pre-set/saved filter then click 'Load'. You can clear a filter at any time by highlighting and selecting the 'Clear Filter' option.

Loading and saving archived responses

To archive a response you must be viewing the results. Then from the navigation menu select the icon as shown previously, and it will archive the results to the default folder or the folder you created.



They will be saved in the following format:

Archive directory\Query library\Query\Date query ran

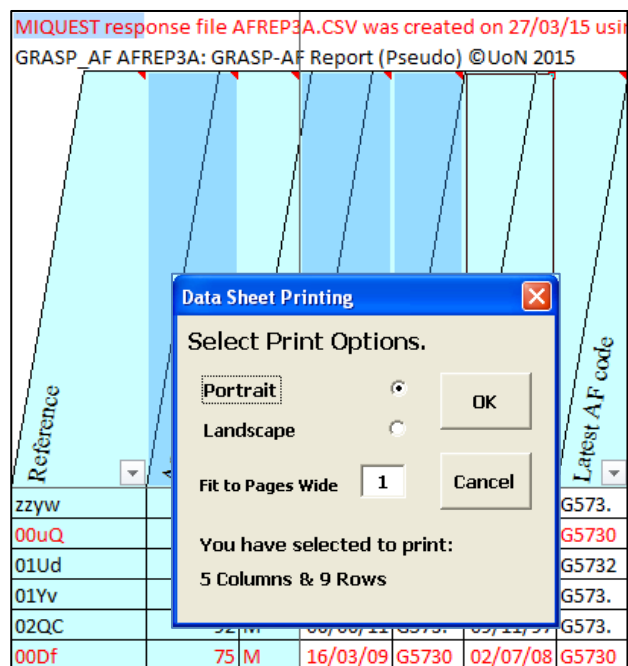
e.g. C:\CHART\Archive\GRASP_AF\Report on patients with AF (Pseudonymised)\20131107AFREP2A.CSV

Once these are saved in the archive directory they can be retrieved at any time. This is done from the CHART home page using 'click to view archived results'. This will take you to your Archive folder. It is recommended that you archive any existing response files before you load new responses.

Printing the datasheet

Select the columns to be printed by holding down shift and selecting a range of adjacent columns or by holding down Control (Ctrl) and clicking on non-adjacent columns. The columns will appear a darker blue to show they have been selected. Once these have been selected you can click the print icon:

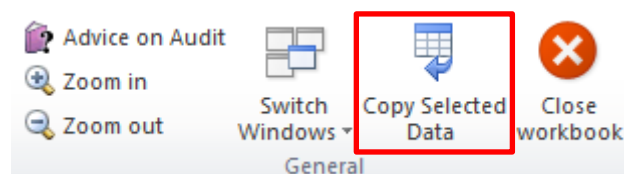
The 'data sheet printing' dialogue box appears and will confirm how many columns you have selected. Choose the paper orientation required and click on the OK button.



Copy data to another workbook

You may want to export the data from the datasheet to another workbook for further analysis. To do this, follow the instructions above in 'Printing the datasheet' to select the columns you want to export, or alternatively, hold the Control and 'A' key at the same time to select the whole workbook.

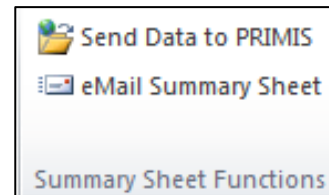
Once a selection is made it is not possible to deselect a single column. If you want to change the selection, please start again by clicking on your first column.



Now your columns are selected click 'Copy Selected Data' from the 'General' PRIMIS CHART toolbar. To view the copied data, click the 'Switch Windows' button and select the new workbook from the drop down list.

Emailing a summary sheet

- From the summary sheet view, click on '**email summary sheet**' on the toolbar.
- A dialogue box will appear where you can enter the recipient's email address.
- You have the option to define a password either to protect the file from being edited or to prevent anyone without the password from opening it. Enter a password if you wish to use this functionality (don't forget to share the password with the recipient in the latter option).
- Click '**email summary sheet**' (ensure Microsoft outlook is open and you have logged in).
- A warning box will then appear stating that an email is being sent, click on '**allow**' to proceed or '**deny**' to stop the transmission.
- If you click '**allow**', your email will be sent with an Excel attachment to your recipient.



NB: This functionality will only work if your default mail software is Microsoft Outlook

Upload to CHART Online

Some libraries allow you to upload data to the CHART Online comparative analysis system. This allows you to compare your practice results with others.

Additionally, some libraries allow you to upload data to a PRIMIS Database so that PRIMIS can forward it to relevant agencies on your behalf (for example, the Influenza vaccine uptake library). The following instructions explain how to upload aggregated data:

1. Load the pseudonymised responses into CHART as described earlier. Only pseudonymised response files can be successfully transmitted to PRIMIS.
2. View the results to check you are happy with them. Ensure you are in summary sheet view and then click the **Send data to PRIMIS** in the Summary Sheet Functions part of the PRIMIS CHART toolbar (shown above).
3. A dialogue box will be displayed stating '**If there is more than one summary sheet open then click yes to send data from all files in this set or No to send only this file**'. If you want to upload data from all the sets you currently have open in CHART, click '**Yes**'.
4. A dialogue box appears showing you the data string that will be sent to PRIMIS. Click '**Close the box to continue**'.

5. A message will appear stating 'If you want to transmit the data string you have just viewed to PRIMIS, then select Yes'. Click 'Yes', otherwise click 'No' to exit without transmitting.
6. Enter your PRIMIS login details and password when prompted.
7. Click '**OK**' when you receive a message confirming that your data has been sent.

If you selected to send multiple response files in step 3, then for each file CHART will show you the data string and ask you to confirm that you want to send it. You will not have to enter your username and password for each upload.

Closing CHART

To close CHART in the quickest way, ensuring that all worksheets are saved and shut down correctly, please return to the home screen and select 'Close Application and Databooks'.

Appendix - CHART toolbar functions

The functions present on the CHART toolbar will change depending upon which view of the data is currently being displayed (i.e. the graph view will have different functions to the datasheet view). A full list of the range of functions is below:

CHART Home	Home	Takes you to the CHART home page
	Configure	Opens the CHART configuration box
	About	Displays the version of CHART being used and access to log file
	CHART Help	Opens up the CHART instruction guide
Navigate	Show Datasheet	Takes you to the patient level data within the datasheet
	Show Chart	Takes you to the pre-set graphs
	Show Summary	Takes you to the summary sheet and dashboard where available
	Archive	Allows you to store a dated copy of the audit report
	Print	Allows you to print the current view or selected columns
	Select Response Workbook	Allows you to switch between reports that are open within CHART (e.g. switch between case finder and main audit)
Summary sheet functions	Email summary sheet	
	Send data to PRIMIS	Allows you to upload aggregated data to CHART Online. <i>(You must be looking at the summary sheet to do this).</i>
Datasheet Functions	Load Filter	Allows you to apply a pre-set or saved filter to the datasheet
	Store Filter	Allows you to save the filter(s) that are currently applied to the datasheet for quick access in future
	Clear (filter)	Quickly removes all applied filters
	Sort A to Z	Sorts the data alphabetically from A to Z
	Sort Z to A	Sorts the data alphabetically from Z to A
	Custom Sort	Allows you to sort the data in a non-alphabetical way e.g. cell colour

Chart Functions	Next Chart	Scrolls to the next pre-set graph
	Previous Chart	Scrolls to the previous pre-set graph
	Change Y Axis Display	Allows you to alter the pre-set graph view by utilising an alternative data item as the Y axis (e.g. change from number to percent)
	Select Chart	Allows you to view all pre-set graphs in a drop-down list for quick navigation
General	Advice on audit	Opens up the full audit instructional guide (if available)
	Zoom in	
	Zoom out	
	Switch windows	Allows you to switch to another file or spreadsheet open in MS Excel
	Copy selected data	Allows you to copy columns from the datasheet to paste into another MS Excel workbook
	Close workbook	