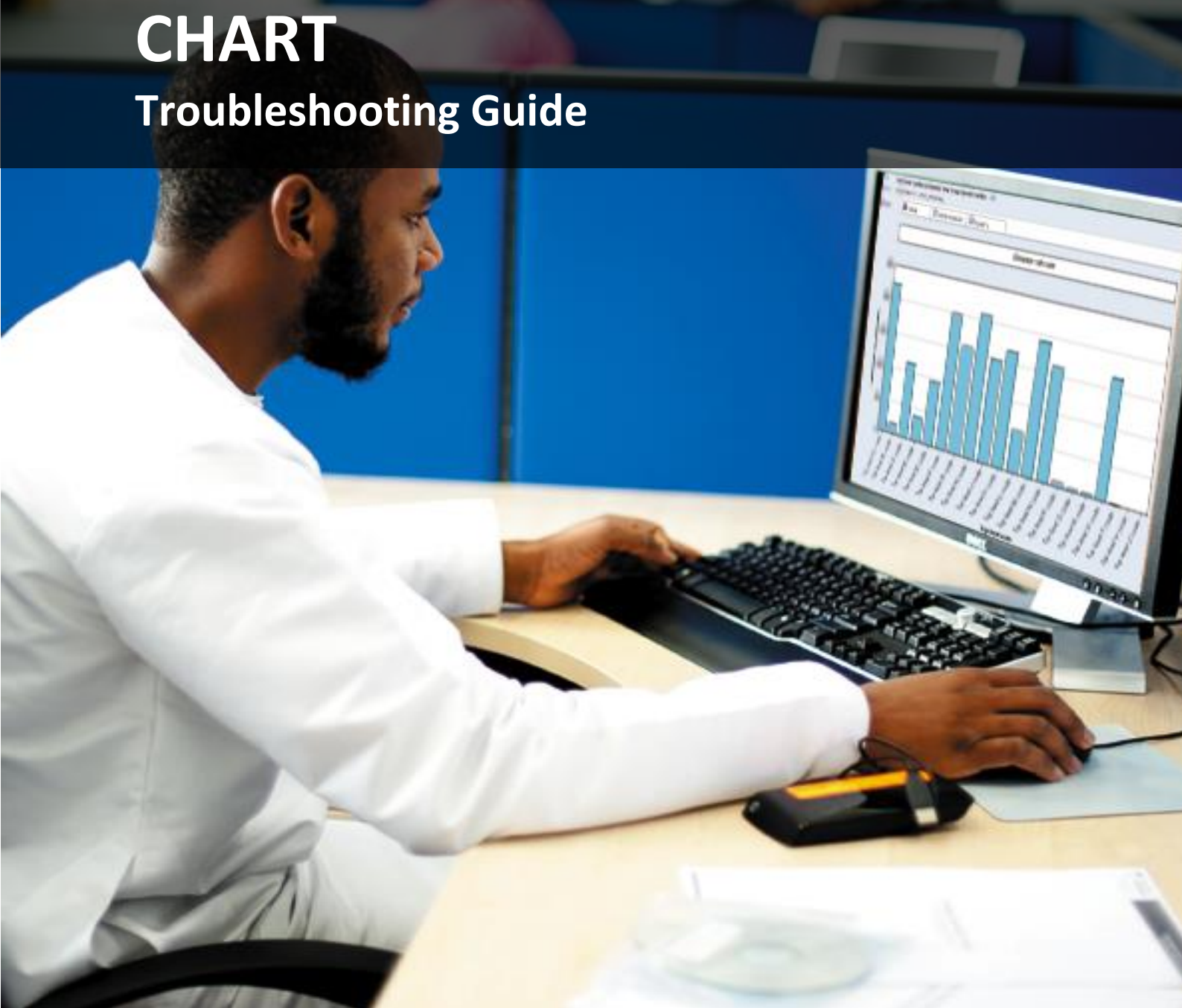


CHART Troubleshooting Guide



Produced by PRIMIS

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1. Installing CHART

When installing CHART or a query library you should follow the prompts in the installation wizard. However you may sometimes be presented with extra questions during the process.

1.1 You are asked to 'Modify, Remove or Repair'

Why does this happen?

The installation file has detected traces of a previous or existing version of CHART on the computer.

Solution 1

At the point you are presented with the three options, select 'Remove' and allow the installer file to remove the previous version.

Then either re-run the installation file again or go back to the PRIMIS Hub and start the download process again. This time the installation wizard should work as normal.

Solution 2

Use the Windows control panel to access the 'Programs and Features' tool. Then highlight the previous version of CHART and select uninstall.

1.2 You are asked for a password

Why does this happen?

The user does not have a high enough security/permission level for adding or removing programmes on the computer. These are normally referred to as administration rights.

Solution

You need to speak to your IT support provider to either arrange for you to have the required permissions or for assistance to install CHART. If this is the case it is recommended that you download all the query libraries that you want in advance of receiving this support.

2. Configuring CHART

When you open CHART you should be able to configure the settings to match your practice details. However you may sometimes encounter the following messages:

2.1 Run-time error '1004'

The full error message will read '**Run-time error '1004': Programmatic access to Visual Basic Project is not trusted**'

Why does this happen?

Excel must be set up to allow the required macros to run (as described in the CHART instruction guide).

Solution

Open MS Excel on your machine then, depending on your version, follow the instructions below:

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

Note: If these options are 'greyed' out and are not set to either 'Disable all macros **with** notification' or 'Enable all macros' and cannot be changed and you cannot select the Trust access box, please contact your local IT support for assistance. This indicates that you don't have sufficient permissions to make the changes.

2.2 Config.ini error message

See the solutions in 2.3 below.

2.3 All the fields in the configuration set-up tab are blank

Why does this happen?

The download and installation process may have corrupted the installation file or it may have been edited in error at a previous point in time. It is not always possible to determine the cause but luckily the solutions are straightforward.

Solution 1

Click on the PRIMIS CHART menu and select the 'Reset Chart' button. Then close and re-open chart. You should find this resolves the problem. If not, try solution 2.

Solution 2

Try to open CHART without using the desktop shortcut (sometimes the desktop shortcut is not updated correctly). Using Windows Explorer locate the Chart.xls file in the C:\CHART folder. Double click on this to open CHART. If you find this works without presenting the same error you can replace the shortcut on your desktop by right clicking on the Chart.xls file and select 'create shortcut'. If this does not work try solution 3.

Solution 3

Close CHART

1. Go to Windows Explorer and open the C:\CHART folder
2. Open the 'Config' folder
3. Open the 'Config for new installations' folder
4. Copy the config.ini file from within this folder
5. Paste the config.ini file into the Config folder from step 2 above (i.e. C:\CHART\Config) - make sure you replace the existing file
6. Open CHART and re-enter the practice details and file paths in the configuration menu
7. Ensure that you have the latest licences for the query libraries you are using via the 'Check for Updates' link within CHART
8. Close and then re-open CHART

You should then find CHART now operates normally, if it does not try solution 4.

Solution 4

This is a last resort solution but it usually works well. You will need to completely remove CHART and start the installation process again. This time when presented with the option to 'run' or 'save', choose save first and then run the installation from the saved file. See appendix A for full instructions.

3. Opening CHART

When opening CHART you will normally be asked to accept the software use agreement before proceeding; however you may see one of the following messages.

3.1 Integrity check has failed, correct query files not present

The full error message reads '**The integrity check has failed, the correct queries do not appear to be present**'.

Why does this happen?

Each CHART library folder has an initiation file contained within (e.g. Heroin Misuse.ini). This contains a list of the query files that should exist within that library's 'queries' folder. If, for some reason, the anticipated list of queries does not match the queries that are actually contained within the folder, you will see an integrity check error message.

This is most commonly caused by updating the query library to a more recent version. The update process should replace all the old query files, however, if the new version has fewer files than the previous version, some old files may remain as the installation process cannot remove them. Consequently, because the old hql files are not listed in the new library's initiation file, you see an "integrity check has failed" error message.

Solution

The steps outlined below assume that CHART has been installed on the C:\drive of your computer; however, even if CHART is installed in an alternative location, the general principles remain the same.

The simplest solution is to remove the query library that failed the integrity check:

- Open the Control Panel (accessed via the Windows start button)
- Open 'Programmes and Features'
- Locate the query library that failed the integrity check and select uninstall
- Using Windows Explorer, browse to the C:\CHART folder and delete the corresponding query library folder
- Use the CHART 'check for updates' facility to re-install the library from scratch

Note: If you intend to view any old responses that you have run using the previous version of the query library you may encounter error messages and the summary sheet will not display. If it is imperative that you need to be able to view older results please contact the PRIMIS helpdesk.

3.2 Synapse addin missing and compile error

The full error message will read **'Synapse Addin missing, compile error in hidden module: mod_b2Ininfiles.'**

Why does this happen?

When CHART opens, it adds extra features to the Excel menu options; this includes the PRIMIS CHART menu and the ability to upload to CHART Online.

This is known as an 'addin'. The one CHART uses is called the 'synapse addin'. It can inadvertently become deactivated, sometimes because multiple versions of Excel are open and closed while CHART is open. The addin can also close without CHART noticing until you attempt to upload to CHART Online.

This can also happen if you have a copy of the main CHART folder on the C:\ drive and on a network drive. Excel doesn't know which folder to load the addin from.

Solution 1

- Close CHART but leave Excel open
- Click on the large circular 'Office' button in the top left corner (Excel 2007) or the 'File' menu and then 'options' (Excel 2010)
- Click on 'Add Ins'
- Choose 'Excel Add Ins' from the 'Manage selection options' at the bottom of the screen
- Click on 'Go'
- A pop up box will appear. There should be a tick box labelled 'Synapse' in the list of options
- Make sure it is ticked, click OK
- Close down Excel

If you cannot add a tick to the synapse option, or if Excel displays further errors go to Solution 2.

Solution 2

- Using Windows Explorer, browse to your CHART folder (C:\CHART\)
- Open the 'CHART' folder
- Open up the 'Config' folder
- Double click the 'Synapse.xla' icon
- Agree to any further messages/prompts you are given
- Close down CHART then re-open it

Solution 3

Perform a clean installation (see appendix A). There should only be one main CHART folder, preferably on the C:\drive. The query, response and archive directories can be separate elsewhere on the network.

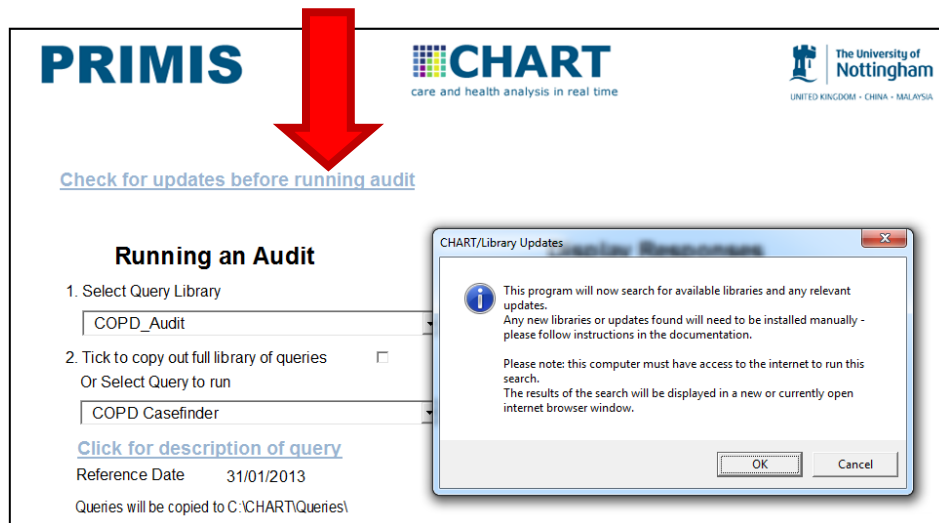
3.3 Library is out of date warning

Why does this happen?

All PRIMIS query libraries (both free and paid for) are issued with a licence and an anticipated expiry date for the library. When the expiry date has passed, CHART will display a warning informing users. You need to check whether there is an updated version of the library available.

Solution

In order to check whether you have the latest version(s) of the query libraries (or licences) use the 'check for updates' facility within CHART. You will need to login using your membership credentials.



If you already have the latest version of CHART

Upon checking for updates you will see the library status page (see image below). In the background CHART will automatically update any licences. You will see a pop up message listing the licences that have been updated and you will need to acknowledge this by clearing it from the screen.

The library status page will indicate which of your installed query libraries are up to date (this is not related to licences). Any query libraries in the list with a red cross indicate that the query library needs to be updated. Click the download button to obtain the latest version. Any query libraries in the list with an exclamation mark are not yet installed on your computer.

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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: lauren.fensome@primis.nottingham.ac.uk **Practice code:** M12345 **Clinical system:** INPs Vision 3

Excel Version	CHART software	Installed Version	Latest Version	Status
2007	CHART 2007 Generic V2 (5 byte)	2.700.150	2.700.150	✓

Query Library	Library Expiry	Availability	Licence Expiry	Installed Version	Latest Version	Status	Action
Atrial Fibrillation (AF) Casefinder	30 Jun 2013	All members	31 Mar 2013	Not installed	3.0.1	!	Download
Coeliac Disease	30 Jun 2013	Full members	31 Mar 2013	1.0.1	1.0.1	✓	

If your version of CHART is out of date

The table at the top of the library status page shows you whether your version of CHART is out of date. If it is, you will see a red cross and a download button. It is strongly recommended that you always download and install the latest version of CHART.

3.4 Query persistently reports that it is out of date

Why does this happen?

Some query libraries have a natural expiry date beyond which they are not renewed, for example the Learning Disability SAF queries. Similarly, if you have purchased a library directly (such as the PRIMIS data quality indicators) or have purchased full membership, the query licence(s) will only be valid for 12 months. Expired licences are highlighted on the library status page.

Solution 1

Any library that has reached the end of its natural life should be removed using the 'Programs and Features' tool accessed via the Windows Control Panel.

Solution 2

Any library purchased more than 12 months ago can be re-activated upon the purchase of a new licence. Please contact us to arrange this.

3.5 Password prompt when opening CHART

Why does this happen?

This may happen if you have an old version of CHART installed (e.g. for Excel 2003) but have since upgraded to a newer version of Excel.

Solution

- First you need to decide if you want to keep copies of any previous searches/results. If you do, create a folder called 'CHART OLD'. Place this on your shared network drive and move all existing results to that folder
- You now need to uninstall the old version of CHART. You can do this via the 'Programs and Features' tool accessed via the Windows Control Panel
- We advise that you also delete the C:\CHART folder (using Windows Explorer)
- Now install the correct version of CHART (depending on your version of Excel). Follow the instructions in Appendix A.

4. Problems that happen at any time

4.1 Problem with adding or removing from the Aspire menu

Why does this happen?

The Aspire Menu is a tool bar created by CHART when CHART is first opened. Unfortunately Excel can occasionally "lose" this menu. This can happen when selecting multiple response files to load into CHART and one of those files has no patients in it (zero result).

Solution

Simply close CHART and reopen it. Reopening CHART will cause the Aspire menu to be recreated.

4.2 Problem in trying to Archive - Module is DoArchive

The full error message will be '**Problem in trying to archive the current file, module is 'DoArchive'.**

Why does this happen

This can happen when using the archive function to save a copy of your results. If the computer has two versions of CHART installed it will generate this message. This can also happen if you are using an older version of CHART and have selected a network drive folder as your archive folder.

Solution 1

If you are using an older version of CHART you will need to update it. To ensure you do not lose any archived data, and to minimise the amount of libraries you have to reinstall, follow the instructions in Appendix A. The updated version of CHART will allow you to create an archive folder on a network drive.

Solution 2

If you cannot update your version of CHART for any reason create an archive folder within the CHART folder on your C drive and configure the file path to that.

4.3 The dropdown boxes or hyperlinks are not working

Why does this happen?

In Excel 2007, when you open CHART you will be asked to enable the macro functionality. If you skipped this or selected the wrong option by mistake, none of the features will work. You can usually tell if you have done this because the software use agreement will not have popped up.

Solution 1

Simply close and reopen CHART. The message bar will display the options to enable again. If you are using Excel 2010 simply enable the macros and you will not be asked again the next time you open CHART.

5. Errors creating queries or loading responses

5.1 'Problem in writing queries to disk'

The full message will be **"Problem in writing queries to disk. This will occur if one of the queries is missing"**.

Why does this happen?

This error can be caused by several reasons:

- The query delivery directory has been set to a location that no longer exists e.g. S:\Shared\Queries
- Alternatively the query delivery directory has been set to the queries folder contained within a CHART library folder, e.g. C:\CHART\Heroin Misuse\Queries. These folders are where the CHART pre-queries are. These are queries that do not have header information in them, e.g. Practice National Code, Run Order
These folders should never be configured as file paths

Solution 1

Reconfigure the query delivery directory to a suitable location. Use Windows Explorer to browse your computer network to find a suitable folder.

Alternatively, create a new one (this can be anywhere on the network). Then use the CHART configuration option to map to the new folder.

Why else does this happen?

The CHART Configuration file may have become corrupted either during installation or accidentally by someone accessing the CHART folder.

Solution 2

Either use the 'reset CHART' button or manually replace the configuration file. Another option is to reinstall CHART as per instructions in Appendix A.

Other reasons this may happen

Someone (possibly your IT Department) has locked the C drive, meaning the files and folders on it cannot be altered.

Solution 3

CHART ideally needs to have the C drive unlocked to operate but you can create the query delivery directory, response delivery directory and archive folders on your practices shared drive instead.

Note: If you cannot recreate the folders or reinstall CHART this will be due to IT restrictions. Please share these instructions with that team for a local solution.

5.2 CHART cannot see or load results from my responses folder

CHART is not showing any reports or responses either when:

- You have clicked on 'View your practice results' or
- You have browsed to the location where you have saved the csv response files (exported from the clinical system)

Why does this happen?

There are two possible reasons for this. To identify which it is, do the following:

- Using Windows Explorer, browse to where you believe the csv response files should be (ie. the location specified in the CHART configuration settings – response file default directory)
- If you can see the Excel csv response files, go to reason 1
- If you cannot see the Excel csv response files, go to reason 2

Reason 1 - not all the responses have run/been exported.

All CHART query sets will produce some subset files beginning with AA (sometimes CC) and report files ending in either a REP or REPA. If you do not have the REP or REPA file sitting in the folder specified as your response file default directory, then you will not see any report names when you click to 'View your practice results'.

Why this might have happened

- The REP/REPA file has run on the clinical system, but not been exported to the responses folder and remains within MIQUEST on your clinical system.

Solution 1

If the REP or REPA file is still sitting on the clinical system, export it to the response file default directory and try loading in the report again.

- Sometimes the REP/REPA files have not run on the clinical system. This may happen if a batch of queries has been set to run before the whole set have been authorised. If this is the case, see solution 2.

Solution 2

If the REP or REPA file did not run, delete all the queries from the clinical system and response file default directory. Restart the process by importing and running all the queries again.

Reason 2 - the computer you are on cannot access the drive where the responses actually are.

(Changes on the network such as drive letters may make it appear that you are looking at the drive where the response file are when it is not actually the case).

Solution 3

Either re-map the file path to the correct location or create a new responses folder and export the responses to this new folder.

PRIMIS are unable to advise on local networking issues – please contact your IT department.

5.3 The response file has no data in it

The full message may read **'The response file has no data in it. If you expect there to be then check with the author of the query file.'**

Why does this happen?

There are several reasons why this might happen:

Reason 1 – a zero result is actually correct. For example:

- Feverish Illness in Children under 5 – no children under 5 have a record of a temperature in the last 3 months.
- PINCER – there is no Read code against patient names indicating that they are receiving a particular drug, therefore the number of patients at risk can't be calculated.
- The Wrong Sex Queries in the IM&T DES – it is perfectly possible that a practice has no male patients with a female code and vice versa.
- The Top Level Codes Query in the IM&T DES – again a practice may have no patients with a top level code.

Solution 1

Under these circumstances no action is necessary.

Reason 2 - no patients have been found because the wrong library for that clinical system has been installed.

Solution 2

Check that the correct clinical system has been selected in the CHART configuration menu. If it was incorrect, you must uninstall the library using the 'Programs and Features' tool (accessed via the Windows Control Panel) and also delete the query library folder (C:\CHART\Queries\Library Name). Then 'check for updates' to install the correct library into CHART. Remove any queries from the query delivery directory and responses from the responses delivery directory. Now you are ready to re-run the queries afresh.

Reason 3 - a subset has failed to run correctly.

A system process may have interrupted the query library response file but allowed it to pass through incomplete without including any patient data. This can be checked by locating a file ending with 'REP' or 'REPA' within the response delivery directory. Once found, highlight the file and right click, choose the option 'open with' and select 'note pad' from the options available. (PRIMIS use the free tool known as Text Pad <https://www.textpad.com/>).

If at the bottom of the text there is a message about being unable to find a subset, or there is no table of patient names etc this indicates a problem occurred in MIQUEST.

Solution 3

Run the queries again. If you get the same error you will need to ask the clinical system suppliers to dial in and see what is happening.

5.4 Response file (location of file) appears to be corrupted

Note: This is NOT a CHART display error. The most likely explanation is that a MIQUEST query failed.

Reason 1 - the query did not run correctly on the clinical system and is now corrupt. To confirm the reason, follow the steps listed for **5.3, reason 3** on the previous page. There may be an error message indicating why the clinical system could not process it correctly. Report this to your system supplier.

Reason 2 - the csv file has been opened in Excel and saved (maybe by the auto save). This corrupts the file as Excel will add lots of extra "quotation" marks into the file as well as removing many of the existing "quotation" marks already in it.

Solution

The solution is the same in both cases - rerun the set of queries.

5.5 The Readcode swap file Swapcode.txt does not exist

The full message may read **"The Readcode swap file 'Swapcode.txt' does not exist. This may cause a problem or simply display as readcodes not text"**.

Why does this happen?

The Readcode Swap file is a file that exists in some CHART library folders. Its purpose is to swap Read codes displayed in the datasheet for more meaningful names or text descriptions. For example, within the 5 DES Ethnicity queries, it swaps Read codes such as 9i25. and 9i26. for the more meaningful text description "Any other White background"

If this file is not present, you will get the above error message. The file might be missing in two ways:

1. The Readcode Swap file is missing from the CHART library folder
2. You have opened a set of responses but the relevant library folder is missing from that computer's CHART folder. This sometimes happens if you hot-desk in the practice.

Solution

Reinstall the library using the CHART update facility.

5.6 The responses load without a summary sheet

Why does this happen

Reason 1 - you have opened a set of responses but the relevant library folder is missing from that computer's CHART folder. This sometimes happens if you hot desk in the practice.

Reason 2 - the searches were run with an older or newer version of the query library that is installed with the version of CHART you are using.

Solution

Reinstall the library using the CHART update facility

5.7 Runtime error 13 – Type Mismatch

Why does this happen?

This is usually caused by Excel having trouble manipulating a date within the csv file. The date might be in the wrong format, e.g. "21.03.2010", or it might be a date that does not exist, e.g. 31/11/2010.

Solution

Open the csv file in a text editor (see **reason 3 in 5.3** on page 14 for instructions) and see if you can spot anything that looks odd date wise.

5.8 Input Past End of File

Why does this happen?

CHART thinks that there are unseen strange characters at the end of your response file.

Solution

This requires an advanced text editor to be installed. PRIMIS use the free tool known as Text Pad <https://www.textpad.com/>

- Open the response file generating the error message in TextPad
- Click the "show paragraph marks and other hidden formatting symbols (¶)" button so that you can see page returns, tab marks, etc.
- If there are any characters or lines after the last line of text at the end of the file these need deleting and the file can then be saved.

6. Uploading Responses to CHART Online/PRIMIS Database

6.1 There is no "Upload to CHART Online" icon

Why does this happen?

You have either only loaded named (patient identifiable) responses or have forgotten to run the anonymised responses. You can only see the upload button in the anonymised data set as it has a built in security feature.

Also remember that some audit tools do not have an upload function as there is no corresponding toolkit within CHART Online.

Solution

Check the audit instructional guide to confirm that the audit you wish to upload does have CHART Online functionality.

Go back to the 'click here for new responses link' alternatively click on the select data-book option on the PRIMIS CHART menu and ensure you open the anonymised data set.

If they are not there, check that you have exported them from MIQUEST or re-run the search.

6.2 I cannot upload to CHART Online

Why does this happen

You may not be able to upload if you are having internet connection problems.

Alternatively, you will not be able to upload to CHART Online if you have not signed the correct electronic data collection agreement. For some audit tools, before you upload data, you must sign an electronic data collection agreement. This specifies that you understand what PRIMIS will do with your data. If you have not signed it, you will not be able to upload.

Solution

The error message will usually give you the web address of the agreement. Unfortunately the message cannot display it as a hyperlink, so you will have to manually note it down, and then type it into your web browser. You should also be able to find the corresponding data collection agreement via the PRIMIS Hub.

7. Printing and emailing the summary sheet and data sheets

7.1 Print function on the datasheet results are temperamental

Why does this happen?

The reasons for this may vary but the outcome may mean that the text may appear to be too small on the print out or only part of the summary sheet may have fitted onto one page.

One thing to remember is that each time you click on a column heading, CHART will mark it for printing. The first time you click on a column and the last column you select will not be highlighted, clicking more than once will cause multiple copies of that column.

CHART will print to the default printer which may be set up for a different page size.

Solution 1 – printing from the datasheet

Do not print directly from the datasheet. Use the 'copy selected data' feature to create a copy of the data you wish to print in a separate Excel workbook and use the normal Excel features instead when printing. See the CHART instructional guide.

Solution 2 – printing from the summary sheet

You can use the normal Excel print features while in CHART but only if you wish to print the summary sheet:

- Highlight the area of the summary sheet you wish to print (dashboard/classic view)
- Select print from the office button in 2007 or the file button in 2010
- Choose the option to print selection
- You will now have the normal print features to preview the page before printing.

7.2 I cannot change the printer that CHART is connected to

Why does this happen?

Chart will always print to the computers default printer. If you wish to change this for example to print in colour follow the steps below.

Solution

Click on the start button of your computer and select the devices and printers option. From there change the default printer so that it is marked with a tick mark. Then return to CHART and try printing again.

7.3 I cannot email a copy of the summary sheet.

Why does this happen?

The email summary sheet function relies on access to the desktop version of your email client. It does not work if you access email via the internet only. The solution is to take a manual copy of the data and email it separately.

Solution

- Open CHART and select the relevant summary sheet
- Create a new destination Excel workbook via the toolbar or Ctrl-N shortcut
- Name and save the workbook appropriately
 - alternatively create a new word document
- Return to the summary sheet within CHART and select 'classic view'
- Select your practice ID number or click on an empty cell
- Hold down Ctrl and press A twice - this will highlight the entire sheet
- Click Ctrl-C on the keyboard to copy
- Swap to the destination worksheet and click the cursor in cell A1
 - alternatively switch to the word document
- Click Ctrl-V to paste
- This can now be sent as a normal email attachment

If the pasted data does not look formatted correctly, use the paste special option instead:

- Click on 'Home' on the ribbon menu
- Click on the down arrow under the paste icon
- Select 'Paste special'
- Select one of the picture options from the pop-up menu
- Save
- This can now be sent as a normal email attachment

8. I have forgotten my password

- If you are registering as a new member you must wait for the confirmation email to arrive in your inbox.

This confirmation email is automatically sent, but sometimes there may be a slight delay or it may go straight into your junk folder. This email contains a link which you must click to activate your membership.

- If you know that you have registered, but cannot find the email or recall completing the process please call the Helpdesk and we will send you a reminder.

You can easily reset your password yourself on the PRIMIS Website or the Hub login page. Click on the link 'If you cannot remember your password...' and an email will be sent to you.

The email will contain a temporary password in that email and a web link to follow.

- If you wish to change your password from the temporary one, log into the hub and hover over the 'account' menu at the top of the screen and select 'change password'. Log in with the temporary password and then you can change it.

Appendix A

The best way to perform a clean installation of CHART

1. First consider whether you need to keep any previous results

Before you reinstall CHART you must decide if you need to retain responses that you have saved or archived. Create a new folder on your computer called CHART OLD and move any responses you wish to save into that folder

2. Now uninstall CHART and the query libraries

Go to the 'Programs and Features' tool in the Windows Control Panel and remove CHART and any of the PRIMIS/CHART query libraries

3. Delete the CHART folder and its contents

Use Windows Explorer to find the CHART folder and delete it (important see step 1 above)

4. Download a new copy of CHART from the PRIMIS Hub

Log into the PRIMIS Hub and download and install the latest version of CHART.

Note - If you get the option to "Modify, Remove or Repair", choose "Remove", allow the wizard to complete the removal, then attempt to install CHART again

5. Open the Chart.xls file

Open CHART from the CHART.xls icon within the C:\ CHART folder (this is to safeguard against any old shortcuts which now may be broken).

Reconfigure CHART as per main instructional guide and reinstall your query libraries

Note: If when you open CHART the set up tab in the configuration menu displays your practice ID it means that some remnants of the previous version were still on your computer. Check that these details are correct and amend as necessary.

6. Move the saved responses to the archive folder

Now you can move the CHART OLD folder into the CHART archive folder.

Note: If a query library has been updated since you last ran the search, your old responses may not display correctly. See the relevant section of this help guide for a solution