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Frequently Asked Questions: Quick Answers Guide

- Where can I find the tutorial for CDART?
- Is there anything I need to set up in my browser to use CDART?
- How do I set up Firefox to work with CDART?
- How do I set up Internet Explorer to work with CDART?
- Does the calendar have to come up every time I click in a date field?
- Do I have to save every time before switching to a new tab within a form?
- How do I enter a new form?
- How do I view a form?
- How do I delete a form?
- How do I access a different version of a form?
- How do I print a form?
- Cases that I have finished entering are complete, but show as “In Progress” on the forms menu page. Do I need to set them to complete manually?
- What are breadcrumbs?
- How do I navigate the HLIST?
USER GUIDE

Before you begin using CDART, you may want to review the Captivate tutorial here: http://www2.cscc.unc.edu/home/cdart2train/

SYSTEM

CDART Internet Browser Settings

Regardless of what browser you are using, it must be set so that it will not suggest text entered previously in the same field, such as names, during data entry. The instructions below will cover how to do this in different browsers.

Firefox

1) Clear all history: History → Clear Recent History → Clear All History for Form & Search History → Clear Now.

2) Select Tools → Options → History → Never remember history
3) Uncheck the security options “Remember passwords for sites” and “Use a master password”: From the menu bar, select Tools → Options → Security and then uncheck the two boxes under the heading “Passwords”.

![Security Options](image)

**Internet Explorer (IE)**

*Note: CDART will only in IE versions 10 or 11, and IE must not be running Compatibility View. To turn off Compatibility View: click on the highlighted (blue) Compatibility View icon button. This will reload the web page with Compatibility View turned off, and the website will be removed from the list in compatibility view settings.*

1) Click the gear symbol in the upper right-hand corner of your browser, and then select Internet options → Content → Autocomplete → Settings, and make sure that “Forms” and usernames and passwords on forms” are not checked. Click OK.
Form Features

Forms Menu Page

Icons

- The pencil icon ✒ allows you to enter a new form.
- The magnifying glass icon 🔍 allows you to view a form already in progress, but not make edits to it.
- The checkmark icon ✅ allows you to mark a form as complete.
- The X icon ❌ allows you to delete a form.
- The page with a blue plus icon 📝 allows you to select a different version of a form. Once you click on that icon, it will bring up the following dialog box, where you may select a different version of the form by using the drop down arrow, selecting the version, and clicking Submit.
• The printer icon allows you to print the form in hard copy, or in PDF format.

**Form Status**

The form status feature has many uses, depending on the study.

You may notice that the form status, regardless of whether or not you have finished entering data, will stay “In Progress”.

A form can be manually marked as ‘Complete’ but that is only necessary if dictated by protocol. For example, MMCC reviewers will ‘lock’ their forms, but they may only lock them if they are ‘Complete.’

If you wish to mark a form as ‘Complete’ for your own record keeping, you can. It is merely a status and you would still be able to edit the form.
Any field requiring a date will display a calendar icon in the upper-right corner of the field. Clicking in the field will bring up the calendar.

If you want to close the calendar and enter the date manually, you may do so by clicking the calendar icon again, or by clicking anywhere to the right or left of the field on the same line. Clicking above, below, or anyplace else other than the field line will not close the calendar.

Save and Close, Save, Next Page, and [Previous Form, Next Form]

Save and Close

- Clicking the Save and Close button will save, and then close the form you are working in, and bring you back to the main form menu.

Save

- Clicking the Save button will save your work, but will not close the form or go to the next page.
Note: You do need to save after completing the last page of a form, and when you run a script that is not the first field on a page.

Next Page
- Clicking the Next Page button will automatically save your work, and then take you to the next page in the form.

Note: You do not need to click Save prior to clicking on Next Page. This will save the form twice, and, depending on the form, take a long time to save twice.

Next or Previous Form
- To the right of the Next Page button, or to the left of the Save and Close button, is a button that you can click to take you to the next form you will need to fill out (e.g., CFD, CHI), or back to a previous form (e.g., CEL).

- When you click the button to take you to the next or previous form, your work will be saved automatically.

Note: You do not have to click Save prior to clicking the next form button.

ABSTRACTION FORMS

PTM

Q1 will populate ID if it is a valid phantom ID. If invalid, user must exit form, delete (if saved), and create new valid phantom ID.

HFS, HFA

Q29 - in the current system when EF is listed as normal and no numeric value is reported, "==" is entered. This is a numeric field in CDART and == is not acceptable. A status may be chosen to confirm that the field is blank.

Note: Do not add any codes in note logs for CEL10, CHI2, CHI9 and STR6 (If number of codes exceeds allotted fields follow the hierarchical rules).

DTH

On the DTH form the DTH will tell you when the event is ineligible. If the event is ineligible, you should delete the form.
Navigating the HLIST

The HLIST includes many helpful features. The Parameter page lets you choose year, hospital, the abstraction type and sort on several different criteria.

- Enter the parameter values you want and click ‘OK’.
- The report will run.
- The report will be displayed in a new browser tab.
- The HLIST report only lists work that is yet to be done. An overnight job runs nightly and marks completed abstractions as “Done”. When event IDs are done, these will not show up on the HLIST.
- The report only shows ids that have not been marked ‘DONE’.

Note: Events on the HLIST that originate from the hospital index lists furnished by the field centers will have the following items prefilled: Event ID; Medical Record Number, and Date of Discharge.
If you need to click the same link twice in one session, refresh the report so it will know of any recently added forms.

The ‘FORMS TO BE COMPLETED’ lists the forms and is a link to the first form in the set. If the form has already been keyed, it will open the existing one, if it has not been keyed, it will open a blank one.

The NOFA column is a link to the NOFA.

When you click on a link, it opens the form in a new BROWSER TAB. It is helpful to click back and forth between tabs.
### Commonly Used Terms and Definitions

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Breadcrumbs</strong></td>
<td>Breadcrumbs are a user interface element designed to make navigation easy and intuitive. They are used by operating systems, software programs, and websites. Breadcrumbs display the directory path of the current folder or webpage and provide one-click access to each of the parent directories. Like breadcrumbs in the story &quot;Hansel and Gretel,&quot; they allow you to retrace your steps back to where you started (&quot;Breadcrumbs Definition,&quot; 2014).</td>
</tr>
<tr>
<td><strong>Browser (Web browser)</strong></td>
<td>An application used to access and view websites. Common web browsers include Microsoft Internet Explorer, Google Chrome, Mozilla Firefox, and Apple Safari (&quot;Browser Definition,&quot; 2014).</td>
</tr>
<tr>
<td><strong>Dialog Box</strong></td>
<td>As the name implies, a dialog box serves to initiate a dialog with the user. It is a window that pops up on the screen with options that the user can select. After the selections have been made, the user can typically click &quot;OK&quot; to enter the changes or &quot;Cancel&quot; to discard the selections (Dialog Box Definition,&quot; 2014).</td>
</tr>
<tr>
<td><strong>Field (Text Box)</strong></td>
<td>A field is a user interface element designed for entering data. Many software applications include text fields that allow you to provide input using your keyboard or touchscreen. Websites often include form fields, which you can use to enter and submit information (&quot;Field Definition,&quot; 2014).</td>
</tr>
<tr>
<td><strong>Link</strong></td>
<td>When you are browsing the Web and you see a highlighted and underlined word or phrase on a page, there is a good chance you are looking at a link. By clicking on a link, you can &quot;jump&quot; to a new Web page or a completely different Web site. While text links are typically blue and underlined, they can be any color and don't have to be underlined. Images can also serve as links to other Web pages. When you move the cursor over a link in a Web page, the arrow will turn into a little hand, letting you know that it is a link. The term &quot;hypertext&quot; comes from the way links can quickly send you to another Web destination (&quot;Link Definition,&quot; 2014).</td>
</tr>
<tr>
<td><strong>Login</strong></td>
<td>If you are ever asked to enter your username and password, you are being asked to enter your login information. A login is a combination of information that authenticates your identity. This could be a name and password or an ID number and security code. Many secure Web sites use login information to authenticate visitors before allowing them access to certain areas of the site. Unlike the words &quot;brush&quot; and &quot;comb,&quot; this term should not be used as both a noun and a verb. It should only be used as a noun, (you don't login to a server, you log in to it) (“Login Definition,” 2014).</td>
</tr>
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</tr>
<tr>
<td><strong>Menu Bar</strong></td>
<td>A menu bar is a user interface element that contains selectable commands and options for a specific program. In Windows, menu bars are typically located at the top of open windows. In OS X, the menu bar is always fixed at the top of the screen, and changes depending on what program is currently active (“Menu Bar Definition,” 2014).</td>
</tr>
<tr>
<td><strong>Password</strong></td>
<td>A password is a string of characters used for authenticating a user on a computer system. For example, you may have an account on your computer that requires you to log in. In order to successfully access your account, you must provide a valid username and password. This combination is often referred to as a login. While usernames are generally public information, passwords are private to each user. (“Password Definition,” 2014).</td>
</tr>
<tr>
<td><strong>Toolbar</strong></td>
<td>A toolbar is a set of icons or buttons that are part of a software program's interface or an open window. When it is part of a program's interface, the toolbar typically sits directly under the menu bar (“Toolbar Definition,” 2014).</td>
</tr>
<tr>
<td><strong>Username</strong></td>
<td>A username is a name that uniquely identifies someone on a computer system. For example, a computer may be setup with multiple accounts, with different usernames for each account. Many websites allow users to choose a username so that they can customize their settings or set up an online account (“Username Definition,” 2014).</td>
</tr>
</tbody>
</table>
References