WEB UDART User Instructions

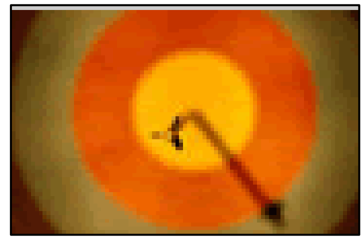


Table of Contents

I. Goals

The UDART system was initiated and developed by ULACHES and UDOH to standardize and improve data collection for local health promotion and education programs.

II. Structure

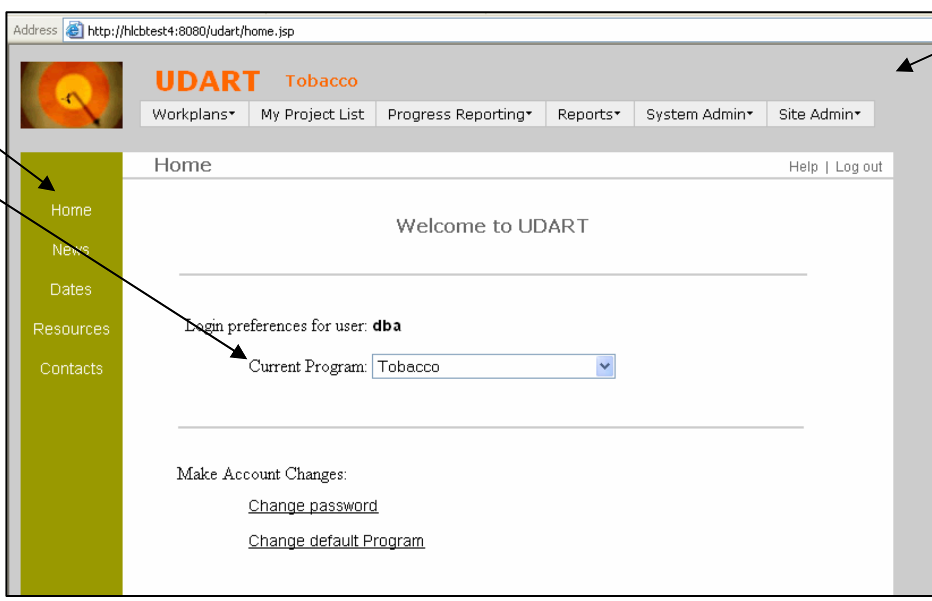
The UDART system consists of four major components

1. The menu builder: The menu builder determines the structure of each local health promotion program (i.e. VIPP, HDSPP, Tobacco, etc.). Dependent on funding sources or focus areas one program can have multiple menus. Each menu consists of strategies (major content areas), objectives, and detail fields. Menus are determined by LHDs and UDOH liaisons at the beginning of the fiscal year and remain unchanged until the next fiscal year.
2. The work-plan builder: The work-plan builder allows LHD users to develop customized work-plans for each program. UDART allows changes to work-plans throughout the fiscal year after negotiations between LHD staff and UDOH liaisons.
3. Progress reporting: This component of the UDART system allows users to report progress on work-plan projects. Based on these progress entries the system generates summary reports that will replace periodical progress reports.
4. Reports: The UDART system currently includes a number of pre-determined reports that users can call up at their convenience. Additional reports can be generated by request.

III. Login, default programs, adding local users

1. Go to http://health.utah.gov/udart/ to open the **UDART login page**. (To save the UDART log-in page as a desktop icon, select File from your browser toolbar; select Send from the initial drop-down box; select Shortcut to Desktop from the next drop-down box. Your UDART log-in page will appear as a desktop icon.)
2. Login (initial login: user name equals your first and last name; password equals your first name)
3. Successful login opens up the **UDART home page**. On the home page users can
   a) change their passwords
   b) change their default health promotion program
   c) access all UDART reporting functions (top toolbar)

   Default health promotion programs can be changed <u>temporarily</u> by selecting a different program from the drop-down box labeled "current program".
   To change the default program for subsequent logins, click on <u>Change default program</u> under "Make Account Changes" and follow the instructions.
   To change the password, click on <u>Change password</u> and follow the instructions.
   To return to the home page from any page in the system, click on Home on the left side of the screen.

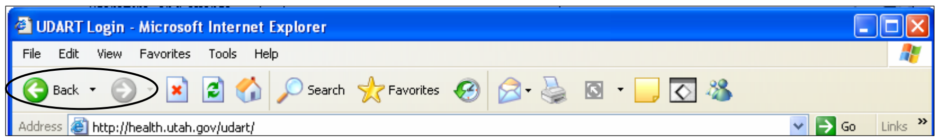


4. To add new local users (Health Promotion Directors and UDART administrators only) click on System Admin on the top toolbar. Select "Employees" from the System Admin drop-down box. Select "Add Employee" from the Users drop-down box. Fill in the fields and save the record.
   Next, select "Users" from the System Admin drop-down box. Select "Add Users" from the Users drop-down box. Fill in the fields and save the record.
   To add or delete information related to employees or users, use the "Edit Employees" or "Edit User" functions. The "Edit User" page allows you to assign new passwords to staff.

IV. Saving information in UDART / Navigating through UDART pages

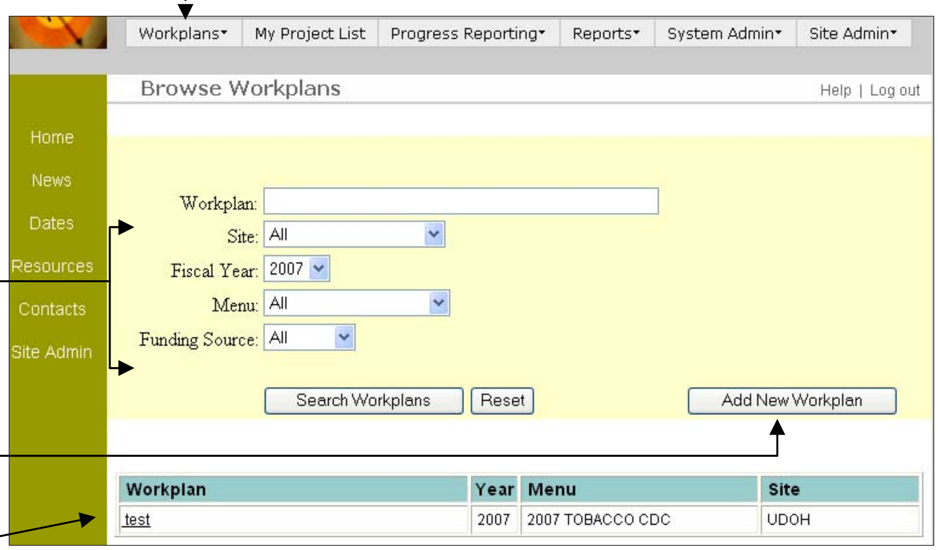
Data added to the UDART WEB system are not saved automatically. To avoid losing data, make sure to click on "Update Record" or "Save Record" before leaving a page. If you forget, the system will show a pop-up reminder.

To go backward or forward from one UDART page to the next use your internet browser's Back or Forward button.

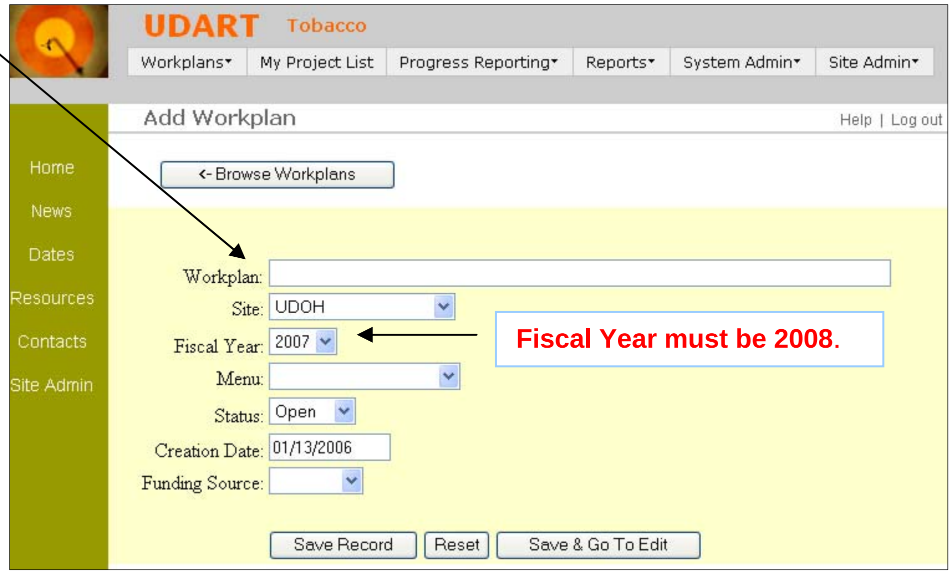


V. Building workplans

Moving the cursor on Workplan on the top toolbar and selecting the Workplans drop-down box, opens up the Browse Workplans page. This page allows users to search for existing workplans and add new workplans.
To search for existing workplans, use the search fields to enter search criteria, then select "Search Workplans." Workplans that meet the search criteria will be listed at the bottom of the page. Click on the workplan name to start editing a workplan.
To add a new workplan, select "Add New Workplan."

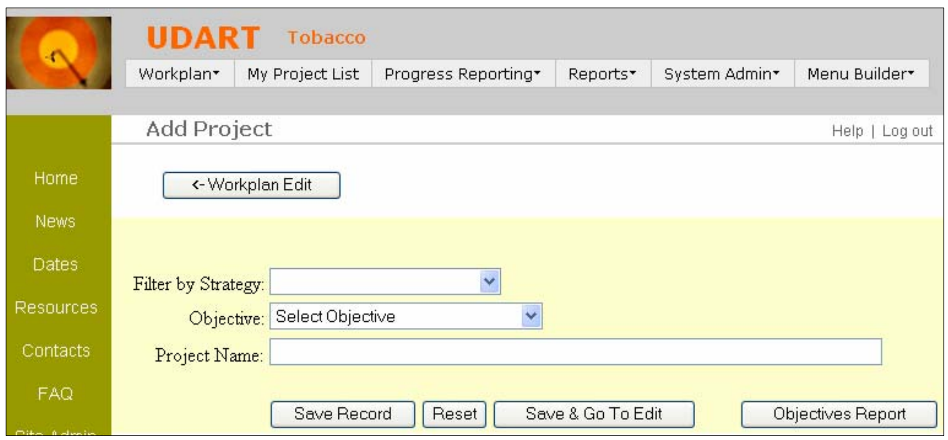


On the Add Workplan page, name your workplan (if you have multiple workplans in one health promotion program, list the funding source or any other distinguishable information in the name), then change the fiscal year to **2008**. Next, select a health promotion program menu from the Menu drop-down box, last select a funding source from the Funding Source drop-down box. To edit your workplan, click "Save & Go To Edit." The Edit Workplan screen opens up. To add projects to your workplan, click on Add Project. To save the workplan name (and complete it at a later point), click on "Save Record".

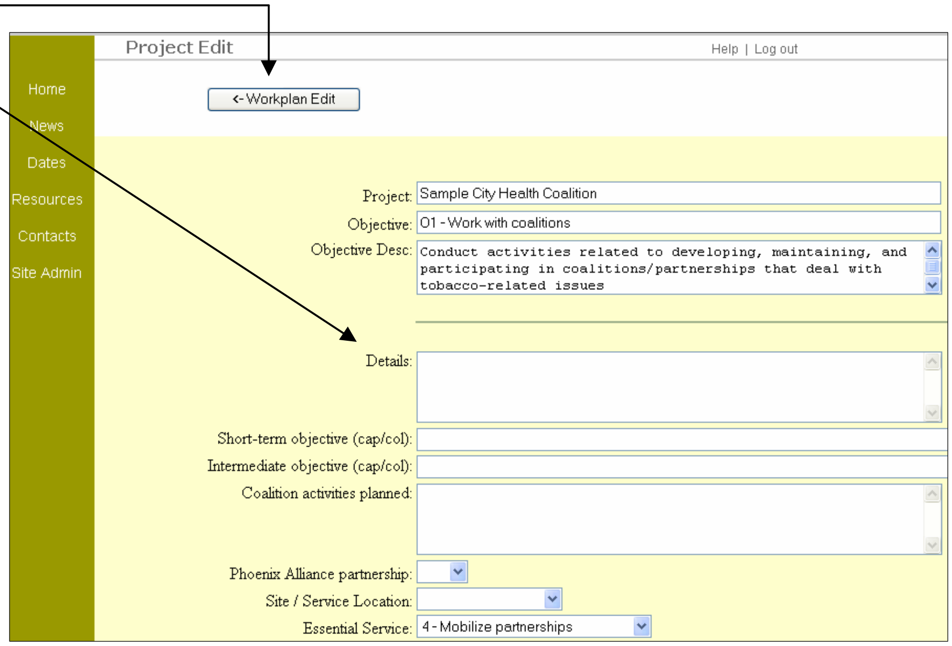


NOTE: Once you created a new workplan and want to enter additional projects, go to the Browse Workplans page, select Fiscal Year 2008 and click on the name of your new workplan.

On the Add Project screen, use the Filter by Strategy and Objective drop-down boxes to link your project to statewide program strategies and objectives. Name your project with a unique, easy-to-identify name. Select "Save Record" to add more project names. Select "Save & Go To Edit" to enter a detailed description of each project. To look up descriptions of all possible objectives, click on "Objectives Report".

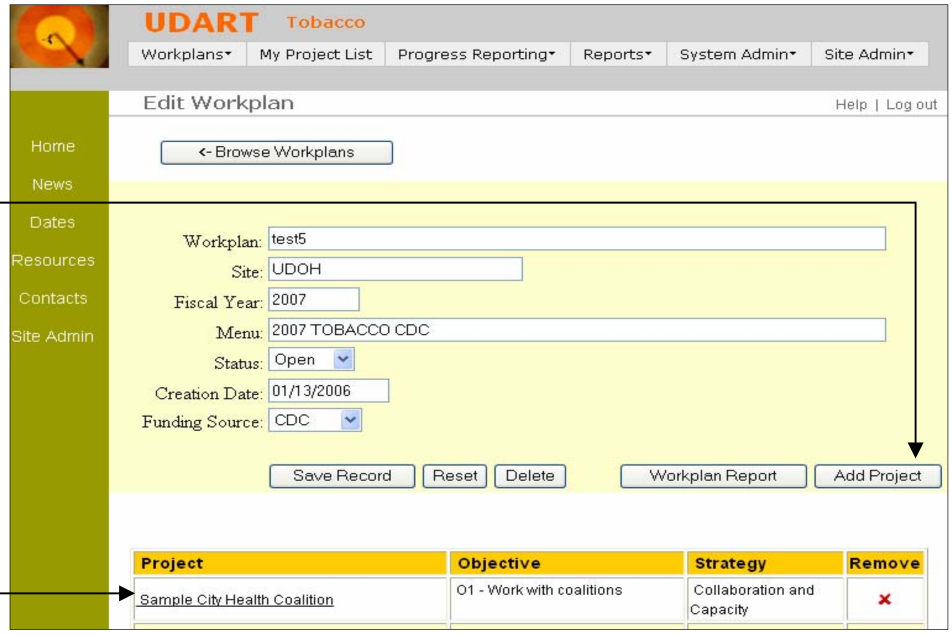


On the Project Edit screen describe your project in the Details field. Fill in the remaining fields by adding text to text fields and selecting the appropriate line from drop-down boxes. The Project Edit fields differ somewhat depending on the type of project you are describing. To save, scroll to the end of the page and click on "Update Record". Clicking on the "←Workplan Edit" button at the top of the page, allows users to add, edit, or remove projects from the current workplan.



The Edit Workplan screen allows users to edit existing projects, by clicking on the underlined project name or to remove projects by clicking on the red x under “Remove”. In addition, users can call up summary or detailed reports of their current workplan or select “Add Project” to enter additional projects.

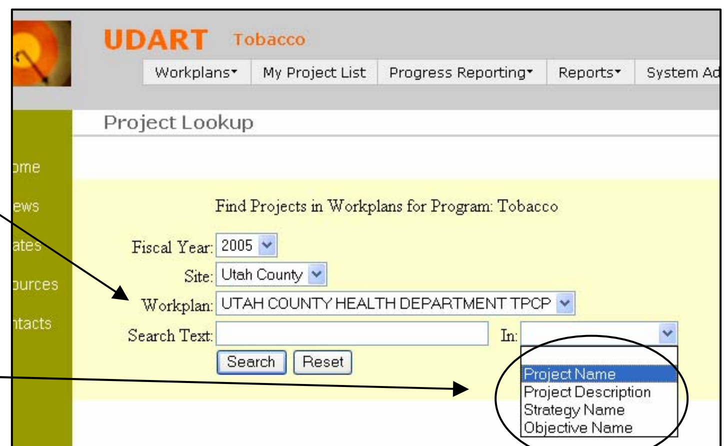
Clicking on the “←Browse Workplans” button at the top of the page allows users to view existing workplans or build additional workplans.



VI. Using “My Project List”

“My Project List” allows users to build personal project lists that provide faster access to selected projects during reporting. Personal project lists can be changed at any time.

To build a personal project list for the first time, select “Project Lookup”. The lookup allows you to find projects by Workplan (select the appropriate workplan from the drop-down box) <u>or</u> by entering search text from all projects (by leaving the drop-down box next to “IN” blank) <u>or</u> by entering search text from the Project Name, Project Description, Strategy Name or Objective Name. If you would like to search by “person responsible” (<u>and</u> this field was used in your workplan), select **Project Description** and type your name into the Search Text field.

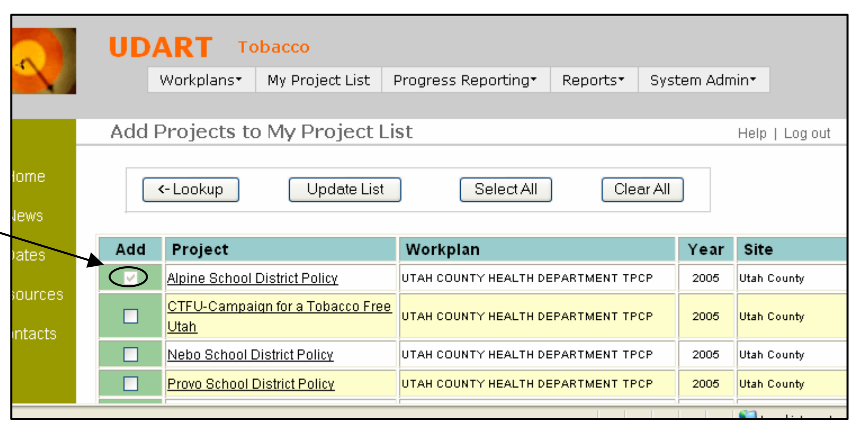


Once projects have been called up, they can be selected and added to the personal project list by clicking the box(es) under <u>Add</u>.

To add all projects on the screen to the personal project list, click “Select All.”

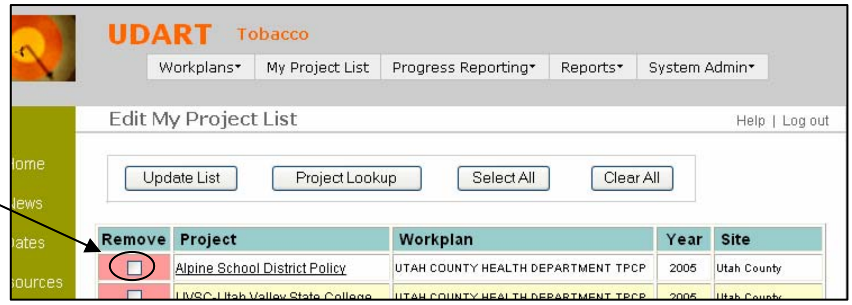
To save changes to the personal project list, click “Update List.”

To call up additional projects, click on “🡐Lookup”.



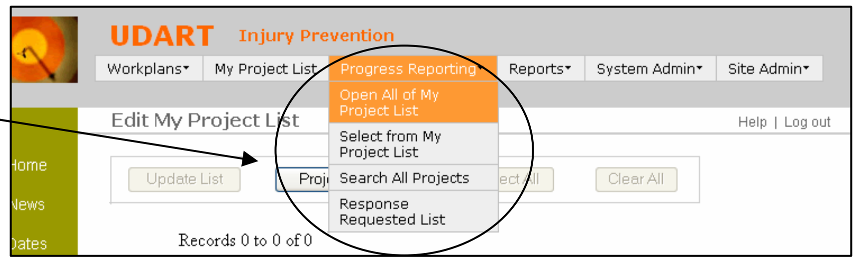
Once the personal project list is created, a column for removing projects appears on the screen. To remove projects, click the box(es) under Remove.

Click "Update List" to save changes to the list.

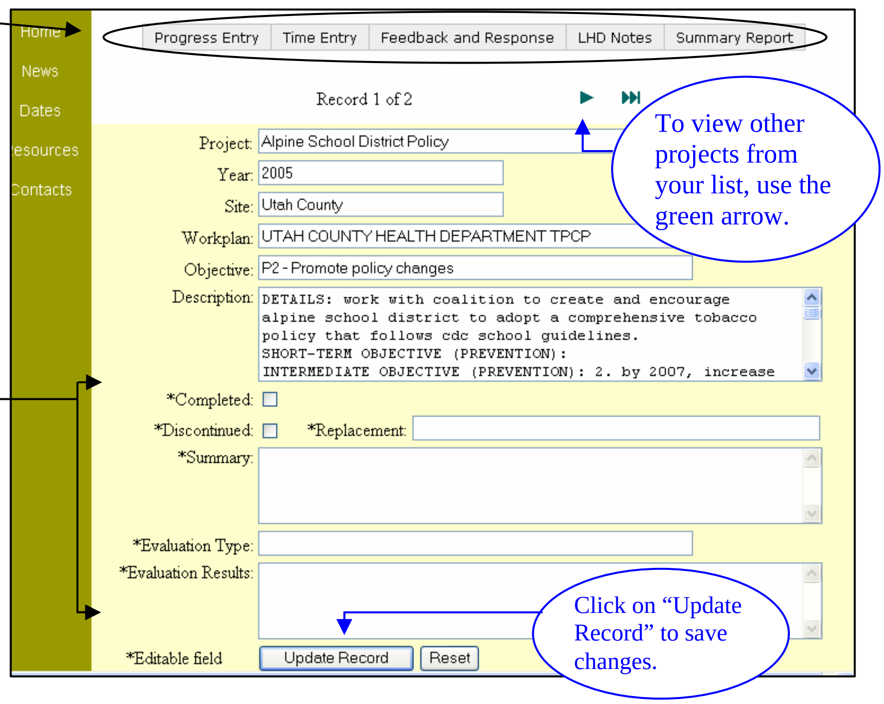


VII. Reporting Progress

Users have four options to look up projects for reporting.

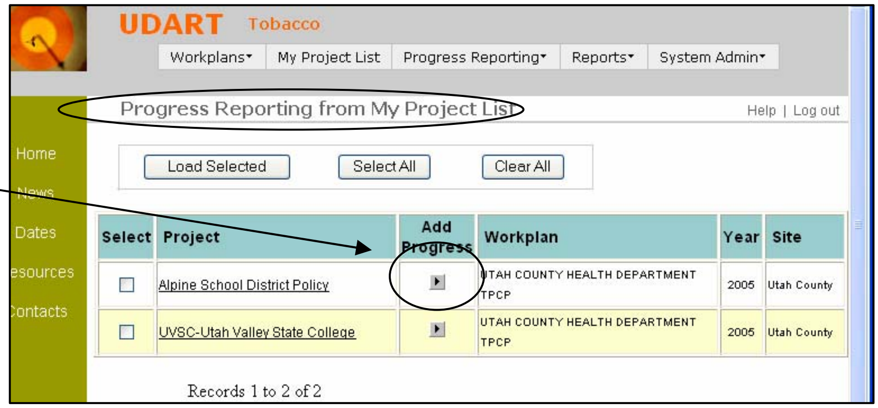


Option 1 "Open All of My Project List" creates pages with descriptions for each project and allows the user to choose "Progress Entry" (= progress reporting), "Time Entry" (accessible to LHDs only), "Feedback and Response" (for communication with liaisons), "LHD notes" (accessible to LHDs only), and a "Summary Report" for the project listed on the page.
This page also allows users to view workplan details for each project and enter summary information such as the completion status and evaluation results.

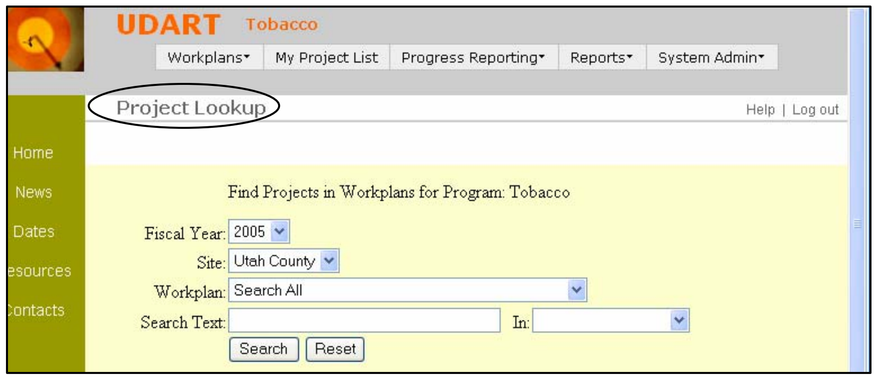


Option 2 <u>"Select From My Project List"</u> allows the users to view all the projects on their personal list.
Users can

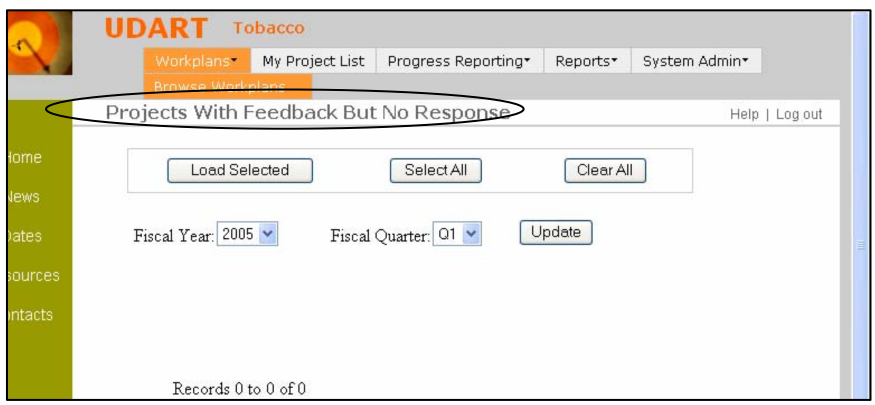
a) Go directly to progress reporting by selecting "Add Progress" for individual projects.
b) Select multiple projects and load selected projects to access all reporting functions (see reporting functions listed under Option 1)



Option 3 <u>"Search All Projects"</u> allows users to select projects for reporting that are not on the personal list. For use of this page, see instructions VI (Project Lookup).

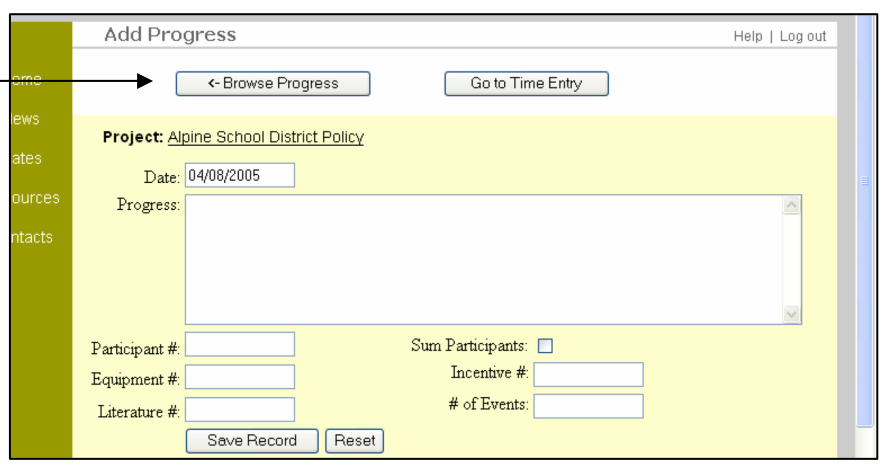


Option 4 <u>"Response Requested List"</u> allows users to call up projects where liaisons entered feedback and LHDs have not yet responded. Users can select the Fiscal Year and quarter to review these projects.



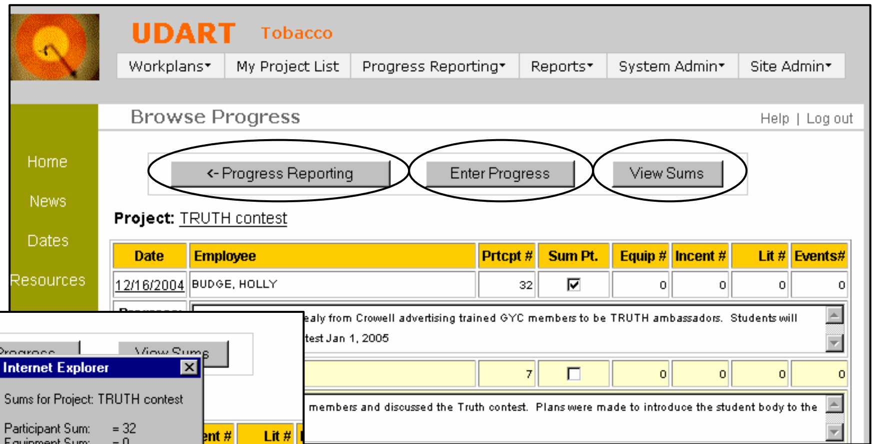
VIII. The "Progress Entry" page

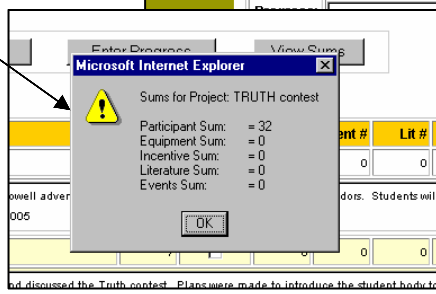
On the Progress Entry Page users update progress and enter numbers for participants, equipment, literature, incentives, and events. If participants are new, check "Sum Participants" to ensure that the system counts these participants.
To view previous entries on the same project, click on the "🡐Browse Progress" tab (see description below).



IX. The “Browse Progress” page

The Browse Progress page allows users to view all progress entries related to a selected project. The “Progress Reporting” tab takes the user back to the main project page (see VII, Option I); the “Enter Progress” tab takes the user to the progress entry page (see VIII); the “View Sums” tab allows the users to view sums for project participants, equipment, incentives, literature, and events.





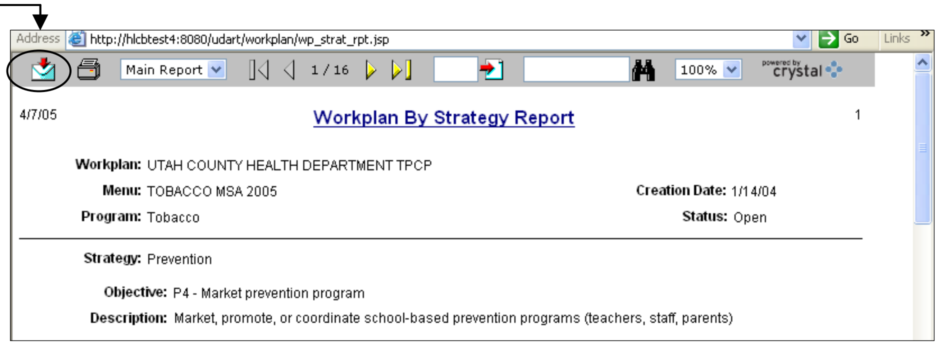
X. Reports

The current version of UDART contains the following reports:

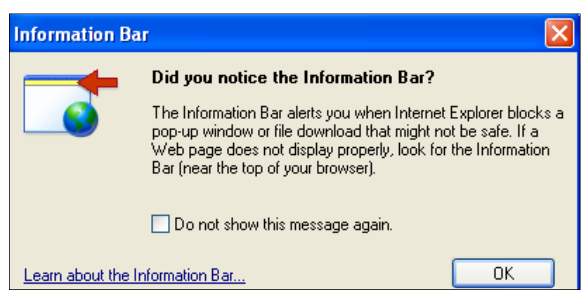
a) LHD notes (accessible to LHD users only)
b) Progress reports
c) Workplan reports (detailed reports and summary reports)
d) Evaluation summary reports
e) Year end participation reports

Additional reports can be generated or added to the system by request.

To save a report as a pdf or rtf document, click on the **envelope icon** in the upper right hand corner, choose the format for saving the report and the pages you would like to include. To save as a word document, save as rtf and then as word.



Note: If your reports do not show in the selected format, you may receive a pop-up box, prompting you to check the information bar in the address line or you may just receive the information bar message shown above. If you receive this message, click on the text “Click here for options…” and choose the option “Download File”. You will have to click on the envelope icon again, and select the pages and format again to complete downloading your report. To avoid pop-up blockers, hold down the control key during the download process.



XI. System Admin

System Admin functions for Health Promotion Directors:

a) My account: change default program and password (see home page)
b) Add/edit employees and users

System Admin functions for LHD staff: my account (change default program and password)