



Search Module

CDC

Version 3.0



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Introduction

The *Search* section allows you to search across organizations for specific information of interest. The Search tab consists of the following sub-sections:

- **My Search Criteria:** Allows you to view, edit, delete, or run searches created by you.
- **Shared Search Criteria:** Allows you to add, edit, delete, and view the results of searches that you and other users have designated as "shared".
- **Pre-Defined Reports:** Allows you to quickly and easily access data across tabs.

The screenshot shows the Search interface with three navigation tabs: System Admin, FOAs & Recipients, and Search. Below the tabs is a breadcrumb trail: My Search Criteria | Shared Search Criteria | Pre-Defined Reports. The main heading is "Search: My Search Criteria". There is a link "Start new search" with a callout box stating "Click this link to initiate a search." Below this is a dropdown menu for "FOA:" with "View All" selected and a callout box stating "The list of search criteria is empty until at least one has been created and saved." Below the dropdown is the text "No information entered."

Access to Search

All CDMIS users have access to the *Search* tab. CDC staff can search for data across all FOAs and also access shared search criteria created by other CDC users, while grantee staff can search for data across only the FOAs to which they have access and to shared search criteria created by users within their organization.



Note

- **CDC staff** can search for data across all FOAs and can access shared search criteria created by other CDC users.
- **Grantee staff** can search for data across all the FOAs to which they have access, and can access shared search criteria created by users within their organization.

My Search Criteria

The *My Search Criteria* list page is the initial page displayed when you click the *Search* tab. Upon initial entry into the summary page, there are no searches displayed if you have not created any. After you have created a search, the page displays all search criteria (both shared and non-shared) created by you, the logged-in user. You can add new search criteria, or generate results, modify or delete existing search criteria. You can specify a set of search criteria, name and save it for later use, and then edit it or delete it if necessary. Although searches displayed under *My Search Criteria* can be viewed, edited, deleted, or run only by you, you can choose to share a search. If you do so, others can view and edit the search but their edits will not affect your original search because the system requires that each search be saved with a unique name.

After searches have been created, the system displays for each search, the search name, associated FOA(s), topic and type, search description, and also indicates if a search is shared or not. You can hover your mouse on a search description to view the complete description of the search and also view more information about the search such as who created it, and when it was created and last updated.

There are two main ways to create a search—using response options or using keywords.

- *Response Options*: Search for specific characteristics pertaining to the selected topic. You will be asked to select specific options that you want to include in the search.
- *Keywords*: Search for a particular keyword in the selected topic. You will be asked to enter the keyword in step 2. When you select the *Keyword* option, the system searches all fields (including text boxes and text areas) in the selected Topic for an exact match of the text entered.

Shared Search Criteria

Use the *Shared Search Criteria* summary section under the Search tab to add, edit, delete, and view the results of searches that you and other users have designated as "shared". Searches displayed in this section can be edited by all users but can be deleted only by the creator of the search. If a shared search is edited by a user other than the one who originally created the search, the MIS requires that the search be saved with a different name.

Upon initial entry into the summary page, there are no searches displayed if no searches have been designated as "shared." After searches have been shared, the MIS displays for each search the search name, associated FOA(s), topic and type, and search description. You can hover your mouse on a search description to view the complete description of the search and also view more information about the search such as who created it, and when it was created and last updated.

The screenshot shows the 'Shared Search Criteria' page. At the top, there are navigation tabs for 'System Admin', 'FOAs & Recipients', and 'Search'. Below these is a breadcrumb trail: 'My Search Criteria | Shared Search Criteria | Pre-Defined Reports'. The main heading is 'Search: Shared Search Criteria'. There is a 'Start new search' link and an 'FOA:' dropdown menu currently set to 'View All'. A search input field is located on the right side of the table area. The table displays a list of search entries with columns for 'Search Name', 'FOA', 'Topic and Type', 'Search Description', and 'Shared'. Each row includes a 'view results | edit' link. A 'Showing 1 - 25 of 173' indicator is present above the table. At the bottom right, there are 'Previous' and 'Next' navigation arrows.

Callouts:

- Click on a column heading to sort the search results by the specific heading**: Points to the 'Search Name' column header.
- Filter the results by entering search criteria**: Points to the search input field.
- Select an FOA to view the search criteria associated with the selected FOA**: Points to the 'FOA:' dropdown menu.
- Select the applicable link to generate results, edit or delete a specific search**: Points to the 'view results | edit' link in the second row.
- Hover over the Search Description for additional information about the search**: Points to the 'Search Description' column.

Search Name	FOA	Topic and Type	Search Description	Shared
1205 yr1 PM 4.2 other govt entities	Comprehensive Cancer Control (DP12-1205)	Resources: Partnerships/Coalitions - Response Options	1205 yr 1 PM 4.2 otehr govt entities	Yes view results edit
1205 yr 1 PM 4.2 other updated	Comprehensive Cancer Control (DP12-1205)	Resources: Partnerships/Coalitions - Response Options	1205 yr 1 PM 4.2 other govt entities - updated April 2014	Yes view results edit
1205 yr 1 PM 4.2 other updated	Comprehensive Cancer Control (DP07-703)	Action Plan: Annual Objectives and Progress - Keyword	Keyword - Evidenced based	Yes view results edit
703 CCC PM 2.2 public health programs YR 5	Comprehensive Cancer Control (DP07-703)	Resources: Partnerships/Coalitions - Response Options	This query includes all CCC programs, partnership/coalition name and public h...	Yes view results edit
703 CCC PM 2.2 yr4 buisness/industry YR5	Comprehensive Cancer Control (DP07-703)	Resources: Partnerships/Coalitions - Response Options	This query includes all 703 CCC programs, organization and buisness/industry ...	Yes view results edit
703 CCC PM 2.2 yr4 other organizations YR 5	Comprehensive Cancer Control (DP07-703)	Resources: Partnerships/Coalitions - Response Options	This query in...	view results edit
703 CCC PM 2.2 yr5 other gov agencies	Comprehensive Cancer Control (DP07-703)	Resources: Partnerships/Coalitions - Response Options	This query in...	view results edit

The *Shared Search Criteria* list page displays the following information for each search:

- **Search Name:** The unique name of the search.
- **FOA:** The Funding Opportunity Announcement(s) included in the search criteria.
- **Topic and Type:** The MIS section included in the search criteria and the type of search.
- **Search Description:** The description of the search. When you hover over the mouse over the description, the complete description in addition to when it was created, and when it was last updated is visible.
- **Shared:** Indicates whether the search is shared or not.



Note

-
- Search criteria are listed in ascending alphabetical order by Search Name, Topic and Type.
 - Click on a column heading to sort the results list by the specific heading.
 - To further narrow search results, enter search criteria into the Search text box.
 - Navigate search results using the **Previous** and **Next** buttons.
-

In addition, from the My Search Criteria list page, the following actions can be performed:

- **view results:** Executes the search criteria and displays the Search Results pages as described in “View Search Results”.
- **edit:** Opens the search criteria to allow modifications as described in “Start New Search”.
- **delete:** Removes search criteria as described in “Delete Search Criteria”.
- **FOA:** Filters the list of search criteria to those for the selected FOA. The selection defaults to ‘View All’ FOAs. The user can select a particular FOA from the drop-down list to view the search criteria applicable to that FOA only.
- **Search:** Allows you to further narrow the search results by the criteria entered into the text box. The system filters the results list as you type the search criteria.
- **Sort:** Click on a column heading to sort the results list by the specific heading. The initial click sorts the column in ascending order. A second click sorts the column in descending order. By default, the result list is sorted by the Search Name. The system displays a sort arrow next to the column by which the list is sorted. For example, if the list is sorted by FOA in ascending order, the system displays the sort arrow, pointing up next to the FOA column heading. If you click the heading again, the system displays the sort arrow, pointing down next to the FOA column heading.

Search Steps

You can create a new search using the following 3 steps:

- Step 1: Select search criteria
- Step 2: Select response options or enter keywords
- Step 3: Select fields to display in results

Create a search using response options

When you search using response options, you are searching for specific characteristics pertaining to a selected topic and will be asked to select specific options that you want to include in the search.

Step 1: Select search criteria



Note

- For all fields that have the **select all** and **clear all** options, you can choose to search across all available options by clicking the **select all** link above the list of items. To unselect the items that you have already selected, click the **clear all** link.
- Use the **Previous** button to return to a previously completed page. If any fields on the page are incomplete or invalid when you click **Previous**, the system displays an error. Correct all errors and click **Previous** again.

1. Click the **start new search** link.

Result: The system displays the required search criteria fields.

System Admin | FOAs & Recipients | Search

My Search Criteria | Shared Search Criteria | Pre-Defined Reports

Search: New Search Criteria Req

Created By: Ruby Silvestriana | Date Created: 07/07/2014 | Date Updated:

Step 1: Select Search Criteria

FOA:

Note: Due to system processing time, please allow 1 second to pass before selecting multiple checkbox options

Select All | Clear All

<input type="checkbox"/> Affiliated Pacific Island Collaborative Performance Agreement	<input type="checkbox"/> Healthy Communities Program: Strategic Alliance for Health (SAH)
<input type="checkbox"/> Collaborative	<input type="checkbox"/> National Program to Eliminate Diabetes-Related Disparities in Vulnerable Populations
<input type="checkbox"/> Comprehensive Cancer Control (DP12-1205)	<input type="checkbox"/> Public Prevention Health Fund: Community Transformation Grant Small Communities (DP12-1216PPHF12)
<input type="checkbox"/> Comprehensive Cancer Control Program (DP07-703)	<input type="checkbox"/> Public Prevention Health Fund: Community Transformation Grants
<input type="checkbox"/> Coordinated Chronic Disease Prevention and Health Promotion Program (CCDP)	<input type="checkbox"/> Public Prevention Health Fund: National Dissemination and Support for Community Transformation Grants
<input type="checkbox"/> DELTA FOCUS (CE13-1302)	<input type="checkbox"/> Public Prevention Health Fund: REACH (DP12-1209)
<input type="checkbox"/> Demonstrating Capacity to Implement Policy and Environmental Cancer Control Interventions (DP10-1017)	<input type="checkbox"/> Public Prevention Health Fund: REACH Demonstration Projects (DP12-1217)

Demonstrating Capacity to Implement Policy and Environmental Cancer Control Interventions (DP10-1017)
 Healthy Communities Program: ACHIEVE
 Healthy Communities Program: Pioneering Healthier Communities (PHC)

Public Prevention Health Fund: REACH Demonstration Projects (DP12-1217)
 Tribal Commercial Tobacco Abuse Prevention Program (DP10-1002)

***Search By:** Response Options Keyword

***Topic:** Select One

***Years:** Select All | Clear All

2015-2016
 2014-2015
 2013-2014
 2012-2013
 2011-2012
 2010-2011

***Organization Name:** 0 selected of 197 available

Type Organization Name to see matching Organizations

Select All | Clear All

Selected Organization Names
 None Selected.

Continue
Cancel

2. In the *Search By* field, select *Response Options*.
3. In the *FOA* field, select the FOA(s) to use for the search from the available FOA(s) in the system.
Result: After completing this field, the system populates the *Topic* field based on your selection.
4. Select a topic from the *Topic* drop-down list. Each item on the topic list represents the sections within each MIS tab.
Result: The system populates the topics list based on the FOA(s) selected.

**Note**

- If you selected more than one FOA, the system displays the topics that are common across the selected FOAs.
- Topics are displayed under their respective sections.
- You cannot select a section; you can select only the individual topic.
- You can select the *Search All* option under *Action Plan* or *Community Action Plan*, if available, to search within every section of the Action Plan or Community Action Plan.

*Topic: Select One

*Years:

*Organization Name:

- Program Summary
- Resources**
- Personnel
- Partners
- Contracts/Consultants
- Planning**
- Standard Data Sources
- Other Data Sources
- Plans and Logic Models
- Action Plan**
- Action Plan (Search All)
- Project Period Objectives and Progress
- Annual Objectives and Progress
- Annual Objective Activities
- Annual Objective Products

5. In the *Years* field, select the year(s) to use for the search. The years displayed are determined based on the FOAs selected.
6. In the *Organization Name* field, click on the text box to view the organizations list and select the desired organization(s) from the displayed list of organizations. You can also type the organization name in the field. As you type the organization name (after typing the second letter) the system displays the organizations that match the text.

Result: The system displays the organizations you select in the *Selected Organizations* list below the *Organization Name* field.

*Organization Name: select all | clear all ected of 83 available

Type Organization Name to see

Selected organization(s)

Click **clear** to remove a selected organization.

Selected Organization Names	
Arizona Department Of Health Services	clear
Connecticut Department Of Public Health	clear
Ohio Department of Health	clear

Continue Cancel



- To include all organizations in the search, click the **select all** link.
- If you select all organizations, the system does not list the organizations individually but displays the number of organizations selected.
- To remove a selected organization from the list, click the **clear** link next to the organization.
- To remove all the organizations that you have already selected, click the **clear all** link.

7. Click **Continue**.

Result: The system displays the *Step 2: Select Response Options* page.



- If any fields on the page are incomplete or invalid when you click **Continue**, the MIS displays an error. Correct all errors and click **Continue** again.
- The selected topic is displayed at the top of the *Step 2: Select Response Options* page. The

displayed topic is not editable. However, you can click the **Modify Search Criteria** link to return to the previous page (*Step 1: Select Search Criteria*) and change the selected topic.

System Admin | FOAs & Recipients | **Search**

My Search Criteria | Shared Search Criteria | Pre-Defined Reports

Search: New Search Criteria

Created By: Ruby Silvestriana Date Created: 07/07/2014 Date Updated:

Step 2: Select Response Options

Selected topic

*Topic:

You selected **Program Information - Contact Information**
[Modify Search Criteria](#)

*Response Options:

Click here to change the selected topic.

Program Mailing Address (State)
[Select All](#) | [Clear All](#)

- | | |
|---|---|
| <input type="checkbox"/> Alabama | <input type="checkbox"/> New York |
| <input type="checkbox"/> Alaska | <input type="checkbox"/> North Carolina |
| <input type="checkbox"/> Arizona | <input type="checkbox"/> North Dakota |
| <input type="checkbox"/> California | <input type="checkbox"/> Ohio |
| <input type="checkbox"/> Colorado | <input type="checkbox"/> Oklahoma |
| <input type="checkbox"/> Connecticut | <input type="checkbox"/> Oregon |
| <input type="checkbox"/> Delaware | <input type="checkbox"/> Pennsylvania |
| <input type="checkbox"/> District of Columbia | <input type="checkbox"/> Rhode Island |
| <input type="checkbox"/> Florida | <input type="checkbox"/> South Carolina |
| <input type="checkbox"/> Georgia | <input type="checkbox"/> South Dakota |
| <input type="checkbox"/> | <input type="checkbox"/> - |

Program Shipping Address (State)
[Select All](#) | [Clear All](#)

- | | |
|---|---|
| <input type="checkbox"/> Alabama | <input type="checkbox"/> New York |
| <input type="checkbox"/> Alaska | <input type="checkbox"/> North Carolina |
| <input type="checkbox"/> Arizona | <input type="checkbox"/> North Dakota |
| <input type="checkbox"/> California | <input type="checkbox"/> Ohio |
| <input type="checkbox"/> Colorado | <input type="checkbox"/> Oklahoma |
| <input type="checkbox"/> Connecticut | <input type="checkbox"/> Oregon |
| <input type="checkbox"/> Delaware | <input type="checkbox"/> Pennsylvania |
| <input type="checkbox"/> District of Columbia | <input type="checkbox"/> Rhode Island |
| <input type="checkbox"/> Florida | <input type="checkbox"/> South Carolina |
| <input type="checkbox"/> Georgia | <input type="checkbox"/> South Dakota |
| <input type="checkbox"/> | <input type="checkbox"/> - |

Step 3: Select Fields to Display in Results

*Fields to Display:

[Select All](#) | [Clear All](#) 4 Selected

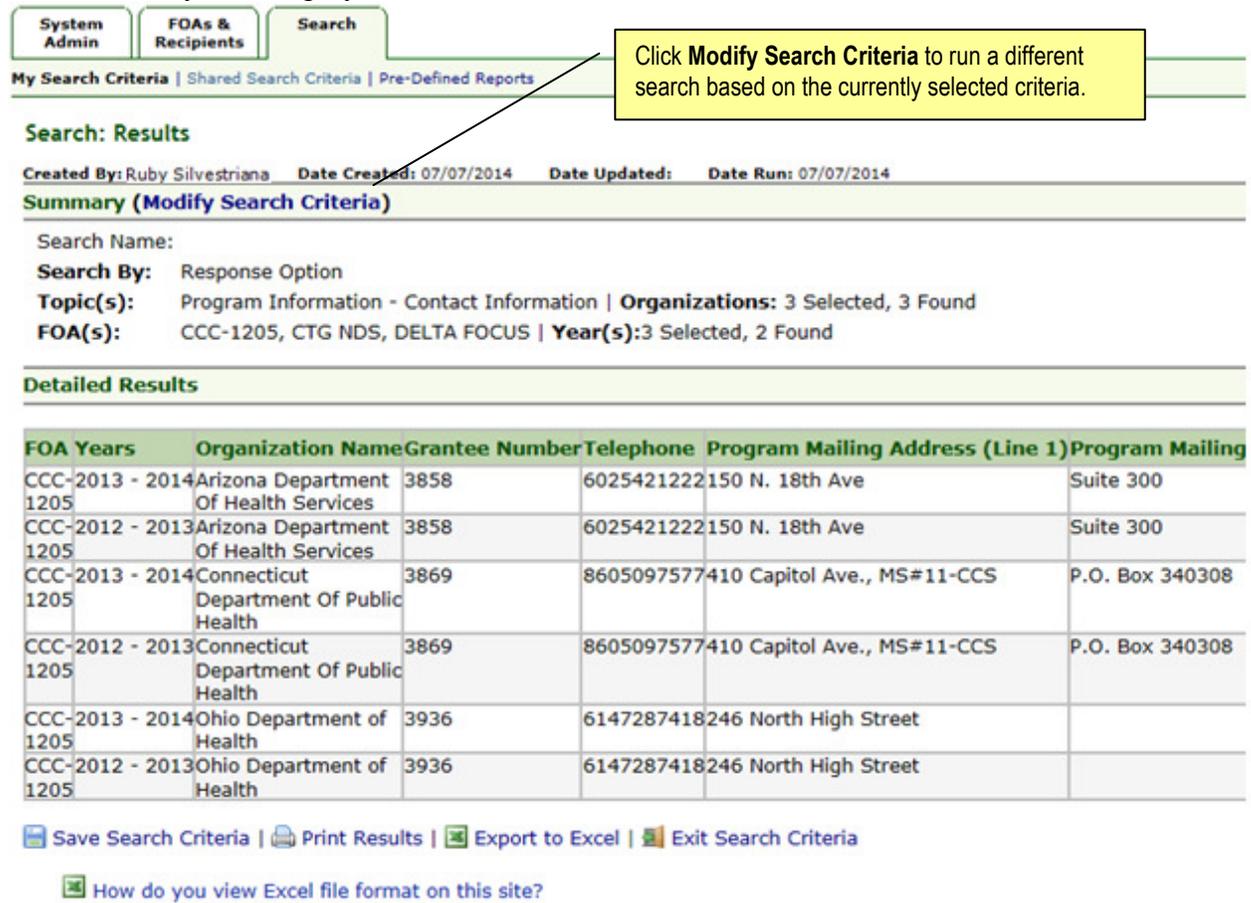
- | | |
|---|---|
| <input checked="" type="checkbox"/> FOA | <input type="checkbox"/> Program Mailing Address (State) |
| <input checked="" type="checkbox"/> Years | <input type="checkbox"/> Program Mailing Address (ZIP) |
| <input checked="" type="checkbox"/> Organization Name | <input type="checkbox"/> Program Mailing Address (Zip ext.) |
| <input checked="" type="checkbox"/> Grantee Number | <input type="checkbox"/> Program Shipping Address (Line 1) |
| <input type="checkbox"/> Telephone | <input type="checkbox"/> Program Shipping Address (Line 2) |
| <input type="checkbox"/> FAX | <input type="checkbox"/> Program Shipping Address (City) |

[Generate Results >>](#) [<< Previous](#) [Cancel](#)

Steps 2 and 3: Response Options/Fields to Display

1. In the *Response Options* field, select the response options to include in the search. The options displayed are distinct and related to the selected FOA and Topic.
2. In the *Fields to Display* field, select the information to include in the search results, e.g. telephone, address, fax number, etc. or setting, status, progress information, etc., depending on the selected response options.
3. Click **Generate Results**.

Result: The system displays the results of the search.



System Admin | FOAs & Recipients | Search

My Search Criteria | Shared Search Criteria | Pre-Defined Reports

Search: Results

Created By: Ruby Silvestriana | Date Created: 07/07/2014 | Date Updated: | Date Run: 07/07/2014

Summary (Modify Search Criteria)

Search Name:

Search By: Response Option

Topic(s): Program Information - Contact Information | **Organizations:** 3 Selected, 3 Found

FOA(s): CCC-1205, CTG NDS, DELTA FOCUS | **Year(s):** 3 Selected, 2 Found

Detailed Results

FOA Years	Organization Name	Grantee Number	Telephone	Program Mailing Address (Line 1)	Program Mailing
CCC-2013 - 2014 1205	Arizona Department Of Health Services	3858	6025421222	150 N. 18th Ave	Suite 300
CCC-2012 - 2013 1205	Arizona Department Of Health Services	3858	6025421222	150 N. 18th Ave	Suite 300
CCC-2013 - 2014 1205	Connecticut Department Of Public Health	3869	8605097577	410 Capitol Ave., MS#11-CCS	P.O. Box 340308
CCC-2012 - 2013 1205	Connecticut Department Of Public Health	3869	8605097577	410 Capitol Ave., MS#11-CCS	P.O. Box 340308
CCC-2013 - 2014 1205	Ohio Department of Health	3936	6147287418	246 North High Street	
CCC-2012 - 2013 1205	Ohio Department of Health	3936	6147287418	246 North High Street	

Save Search Criteria | Print Results | Export to Excel | Exit Search Criteria

How do you view Excel file format on this site?



Note

- The process of generating the results may take a moment depending on the options selected in Step 2 and Step 3.
- If any fields on the page are incomplete or invalid when you click **Generate Results**, the system displays an error. Correct all errors and click **Generate Results** again.
- After generating the results of your search, you can choose to save the search criteria, print the results, or export the search results to Excel.

4. If your search did not generate any results or you want to keep most of your search criteria and run another search, click the **Modify Search Criteria** link.
5. Modify the search criteria and repeat the steps as needed.

Create a search using keywords

When you search using response options, you are searching for a particular keyword(s) in the selected topic. You will be asked to enter the keyword in step 2. When you select the *Keyword* option, the system searches all fields (including text boxes and text areas) in the selected Topic for an exact match of the text entered.

Important information about Keyword Search

When performing a Keyword Search, you can narrow search results by using search types and operators.

Search Types

The search types you can use when performing a search are:

- Single keyword
- Multi keyword
- Exact match

The table below describes each search type, and provides examples of the keywords entered and the search results produced.

Search Type	Description	Example Keywords	Example Search Results
Single keyword	Searches all text boxes in the selected topic for a single keyword	breast	Increase breast cancer examinations by 15% for men aged 18-25
Multi keyword	Searches all text boxes in the selected topic that include two or more keywords	cervical cancer	Cervical and skin cancers are leading diseases in certain demographic groups
Exact match	Use quotation marks to search only for a set of words in all text boxes in the selected topic exactly how you typed them, and in the order that you typed them	“prostate cancer”	The grantee will review prostate cancer prevention strategies for the 2012-2013 budget years

Operators

Operators are words that you can use between keywords to further narrow your search.

The table below describes the operators that you can use for a CDMIS search, and provides examples of the keywords entered and the search results produced.

Operators			
AND	Searches all text boxes in	Lung AND	Reduce incidences of lung

	the selected topic for both words before and after AND	tobacco	diseases caused by tobacco smoke
OR	Searches all text boxes in the selected topic that may have one of several words. Note: In cases where “OR” or “AND” are not used, results will show pages that match both terms.	Lung OR colorectal	Funding initiative was used to bring greater awareness colorectal cancer prevention
Using “OR” with multiple operators	If OR is used in any operator combinations (e.g. Keyword1 AND Keyword2 OR Keyword3) OR will replace any AND operator. Example: “Breast AND cancer OR cervical” searches results for “Breast” OR “Cancer” OR “Cervical”.	Breast AND cancer OR cervical	Cancer screening using the Pap smear can identify precancerous changes in cervical cells

Step 1: Select search criteria



Note

- For all fields that have the **select all** and **clear all** options, you can choose to search across all available options by clicking the **select all** link above the list of items. To unselect the items that you have already selected, click the **clear all** link.
- Use the **Previous** button to return to a previously completed page. If any fields on the page are incomplete or invalid when you click **Previous**, the system displays an error. Correct all errors and click **Previous** again.

1. Click the **start new search** link.

Result: The system displays the required search criteria fields.

System Admin
FOAs & Recipients
Search

My Search Criteria | Shared Search Criteria | Pre-Defined Reports

Search: New Search Criteria *Req

Created By: Ruby Silvestriana Date Created: 07/07/2014 Date Updated:

Step 1: Select Search Criteria

***FOA:**

Note: Due to system processing time, please allow 1 second to pass before selecting multiple checkbox options

Select All | Clear All

<input type="checkbox"/> Affiliated Pacific Island Collaborative Performance Agreement <input type="checkbox"/> Collaborative <input type="checkbox"/> Comprehensive Cancer Control (DP12-1205) <input type="checkbox"/> Comprehensive Cancer Control Program (DP07-703) <input type="checkbox"/> Coordinated Chronic Disease Prevention and Health Promotion Program (CCDP) <input type="checkbox"/> DELTA FOCUS (CE13-1302) <input type="checkbox"/> Demonstrating Capacity to Implement Policy and Environmental Cancer Control Interventions (DP10-1017) <input type="checkbox"/> Demonstrating Capacity to Implement Policy and Environmental Cancer Control Interventions (DP10-1017) <input type="checkbox"/> Healthy Communities Program: ACHIEVE <input type="checkbox"/> Healthy Communities Program: Pioneering Healthier Communities (PHC)	<input type="checkbox"/> Healthy Communities Program: Strategic Alliance for Health (SAH) <input type="checkbox"/> National Program to Eliminate Diabetes-Related Disparities in Vulnerable Populations <input type="checkbox"/> Public Prevention Health Fund: Community Transformation Grant Small Communities (DP12 - 1216PPHF12) <input type="checkbox"/> Public Prevention Health Fund: Community Transformation Grants <input type="checkbox"/> Public Prevention Health Fund: National Dissemination and Support for Community Transformation Grants <input type="checkbox"/> Public Prevention Health Fund: REACH (DP12-1209) <input type="checkbox"/> Public Prevention Health Fund: REACH Demonstration Projects (DP12-1217) <input type="checkbox"/> Public Prevention Health Fund: REACH Demonstration Projects (DP12-1217) <input type="checkbox"/> Tribal Commercial Tobacco Abuse Prevention Program (DP10-1002)
---	---

***Search By:** Response Options Keyword

***Topic:** Select One

***Years:**

Select All | Clear All

 2015-2016
 2014-2015
 2013-2014
 2012-2013
 2011-2012
 2010-2011

***Organization Name:** 0 selected of 197 available

Type Organization Name to see matching Organizations

Select All | Clear All

Selected Organization Names

None Selected.

Continue Cancel

2. In the *FOA* field, select the FOA(s) to use for the search from the available FOA(s) in the system.
Result: After completing this field, the system populates the *Topic* field based on your selection
3. Select a topic from the *Topic* drop-down list. Each item on the topic list represents the sections within each MIS tab. To search across the entire *Action Plan* tab or the *Community Action Plan* tab, if available, click *Search All* under Action Plan or Community Action Plan.
Result: The system populates the topics list based on the FOA(s) selected.



Note

- If you selected more than one FOA, the system displays the topics that are common across the selected FOAs.
- Topics are displayed under their respective sections.
- You cannot select a section; you can select only the individual topic.
- You can select the *Search All* option under *Action Plan* or *Community Action Plan*, if available, to search within every section of the Action Plan or Community Action Plan.

*Topic: Select One

*Years:

*Organization Name:

Program Summary

Resources

Personnel

Partners

Contracts/Consultants

Planning

Standard Data Sources

Other Data Sources

Plans and Logic Models

Action Plan

Action Plan (Search All)

Project Period Objectives and Progress

Annual Objectives and Progress

Annual Objective Activities

Annual Objective Products

4. In the *Search By* field, select *Keyword*.
5. In the *Years* field, select the year(s) to use for the search. The years displayed are determined based on the FOAs selected.
6. In the *Organization Name* field, click on the text box to view the organizations list and select the desired organization(s) from the displayed list of organizations. You can also type the organization name in the field. As you type the organization name (after typing the second letter) the system displays the organizations that match the text.

Result: The system displays the organizations you select in the *Selected Organizations* list below the *Organization Name* field.

*Organization Name: select all | clear all ected of 83 available

Type Organization Name to see

Selected Organization Names

Arizona Department Of Health Services	clear
Connecticut Department Of Public Health	clear
Ohio Department of Health	clear

Continue
Cancel



Note

- If you select all organizations, the system does not list the organizations individually but displays the number of organizations selected.
- To remove a selected organization from the list, click the **clear** link next to the organization.

7. Click **Continue**.

Result: The system displays the *Step 2: Select Keywords* and *Step 3: Select Fields to Display in Results* sections.

The screenshot shows the 'Search: New Search Criteria' page. At the top, there are tabs for 'System Admin', 'FOAs & Recipients', and 'Search'. Below the tabs, there are links for 'My Search Criteria', 'Shared Search Criteria', and 'Pre-Defined Reports'. The main heading is 'Search: New Search Criteria'. Below this, it says 'Created By: Ruby Silvestriana', 'Date Created: 07/07/2014', and 'Date Updated:'. The page is divided into two main sections: 'Step 2: Select Keywords' and 'Step 3: Select Fields to Display in Results'. In the 'Step 2' section, there is a 'Topic:' field with the value 'Action Plan - Action Plan (Search All)' and a 'Keyword:' field. Below the 'Topic' field is a 'Modify Search Criteria' link. In the 'Step 3' section, there is a 'Fields to Display:' section with a list of checkboxes. The 'Generate Results >>' button is at the bottom.



Note

- If any fields on the page are incomplete or invalid when you click **Continue**, the MIS displays an error. Correct all errors and click **Continue** again.
- The selected topic is displayed at the top of the *Step 2: Select Response Options* page.

Steps 2 and 3: Enter Keywords, Select Fields to Display

1. Enter the keyword(s) to use for the search. For more information on entering keywords, refer to Important information about Keyword Search on page 3.
2. In the *Fields to Display* field, select the information to include in the search results, e.g. telephone, address, fax number, etc. or setting, status, progress information, etc., depending on the selected response options. You can choose to include all fields by clicking the *select all* link above the list of items. If you selected all fields and you want to unselect them, click the *clear all* link.
3. Click **Generate Results**.

Result: The system displays the results of the search.



Note

- The process of generating the results may take a moment depending on the options selected in Step 2 and Step 3.
- If any fields on the page are incomplete or invalid when you click **Generate Results**, the system displays an error. Correct all errors and click **Generate Results** again.
- The system highlights the search terms in the results.
- After generating the results of your search, you can choose to save the search criteria, print the results, or export the search results to Excel.

System Admin
FOAs & Recipients
Search

[My Search Criteria](#) | [Shared Search Criteria](#) | [Pre-Defined Reports](#)

Search: Results

Created By: Ruby Silvestriana Date Created: 07/07/2014 Date Updated: Date Run: 07/07/2014

Summary (Modify Search Criteria)

Search Name:

Search By: Keyword - **breast AND cancer**

Topic(s): Action Plan - Action Plan (Search All) | **Organizations:** 3 Selected, 3 Found

FOA(s): CCC-1205, CTG, DELTA FOCUS | **Year(s):** 3 Selected, 2 Found

Detailed Results

FOA Years	Organization Name	Grantee Number	Related Project	Period Objective	Related Annual Objective	Project
CCC-2013 - 2014 1205	Arizona Department Of Health Services	3858	03 - Increase the percent of women (ages 40+) who have had a Mammogram in the past 2 years from 73.90% to 80% by June 2017.		3.2 - Increase the number of Partnering health insurance providers that commit to monitoring and increasing the number of breast cancer screenings. from 0 to 3 by June 2014.	03
CCC-2013 - 2014 1205	Arizona Department Of Health Services	3858	03 - Increase the percent of women (ages 40+) who have had a Mammogram in the past 2 years from 73.90% to 80% by June 2017.		3.2 - Increase the number of Partnering health insurance providers that commit to monitoring and increasing the number of breast cancer screenings. from 0 to 3 by June 2014.	03
CCC-2013 - 2014 1205	Arizona Department Of Health Services	3858	03 - Increase the percent of women (ages 40+) who have had a Mammogram in the past 2 years from 73.90% to 80% by June 2017.		3.2 - Increase the number of Partnering health insurance providers that commit to monitoring and increasing the number of breast cancer screenings. from 0 to 3 by June 2014.	03

Click **Modify Search Criteria** to run a different search based on the currently selected criteria.

4. If your search did not generate any results or you want to keep most of your search criteria and run another search, click the **Modify Search Criteria** link.
Result: The system returns you to *Step 1: Select Search Criteria*.
5. Modify search criteria and repeat the steps as needed.

View Search Results

At the top of the results, the system displays the first and last name of the user who created the search, the date the search was created, the date the search was updated, and the date the search run. After viewing the search results, you can save the search for later use if you choose to do so.

The top of the page displays the name of the person who created the search and when it was created, updated, and run.

The middle section displays the search criteria that produced the results.

The Detailed Results section displays the results of the search.

The system highlights keywords in search results

FOA Years	Organization Name	Grantee Number	Related P...	Project	
CCC-2013 - 2014 1205	Arizona Department Of Health Services	3858	03 - Increase the percent of women (ages 40+) who have had a Mammogram in the past 2 years from 73.90% to 80% by June 2017.	3.2 - Increase the number of Partnering health insurance providers that commit to monitoring and increasing the number of breast cancer screenings. from 0 to 3 by June 2014.	03
CCC-2013 - 2014 1205	Arizona Department Of Health Services	3858	03 - Increase the percent of women (ages 40+) who have had a Mammogram in the past 2 years from 73.90% to 80% by June 2017.	3.2 - Increase the number of Partnering health insurance providers that commit to monitoring and increasing the number of breast cancer screenings. from 0 to 3 by June 2014.	03
CCC-2013 - 2014 1205	Arizona Department Of Health Services	3858	03 - Increase the percent of women (ages 40+) who have had a Mammogram in the past 2 years from 73.90% to 80% by June 2017.	3.2 - Increase the number of Partnering health insurance providers that commit to monitoring and increasing the number of breast cancer screenings. from 0 to 3 by June 2014.	03

The *Detailed Results* section displays the FOA, Years, Grantee Name and the fields selected to appear in the search for each result found.

After viewing the results, you can choose to do the following:

- Save the search criteria that produced the results for future use and also share the search with others, if desired.
- Print the search results. Click the **Print Results** link to open the Print dialog box and print the search results.
- Export the results to Excel. Click the **Export to Excel** link to open a windows dialog box and export the search results to Excel.
- Exit search criteria. Click the **Exit Search Criteria** link to close the *Search Results* window.

Save Search Results

1. Click the **Save Search Criteria** link at the bottom of the search results.

Result: The system displays the *Save Search* pop-up window. The *Save Search* page is pre-populated with the selected search topic and response options, or keyword(s) depending on the type of search.

2. In the *Search Name* field, enter a unique name for the search. This is the name that will identify this search on your list of searches. Maximum is 500 characters, about 100 words.



- The search name must be unique and cannot be duplicated. If a search name is duplicated, the MIS displays an error when you click **Save**. You can then enter another search name and save the search again

3. In the *Search Description* field, enter a brief but meaningful description of the search. Maximum is 200 characters, about 50 words.
4. In the *Share Search* field, indicate if you want the search to be viewable by other users or not. If you select *Yes*, your search will appear under both the *My Searches* and *Shared Searches* sections. If you select *No*, your search will appear only under the *My Searches* section.

5. Click **Save Search**.

Result: The system saves the search and displays the assigned name at the top of the search results.

The screenshot shows a web interface with three tabs: "System Admin", "FOAs & Recipients", and "Search". A yellow callout box points to the "Search" tab with the text "Name assigned to search criteria." Below the tabs is a navigation bar with "My Search Criteria | Shared Search Criteria | Pre-Defined Reports". The main heading is "Search: Results - Breast cancer search 07/07/...". Below this, it says "Created By: Ruby Silvestriana, Date Created: 07/07/2014, Date Updated: , Date Run: 07/07/2014". A section titled "Summary (Modify Search Criteria)" contains the following information: "Search Name: Breast cancer search 07/07/2014", "Search By: Keyword - breast AND cancer", "Topic(s): Action Plan - Action Plan (Search All) | Organizations: 3 Selected, 3 Found", and "FOA(s): CCC-1205, CTG, DELTA FOCUS | Year(s):3 Selected, 2 Found". Below the summary is a "Detailed Results" table with three rows of data.

Search ID	Organization	Count	Topic	Year
CCC-2013 - 2014 1205	Arizona Department Of Health Services	3858	03 - Increase the percent of women (ages 40+) who have had a Mammogram in the past 2 years from 73.90% to 80% by June 2017.	03
CCC-2013 - 2014 1205	Arizona Department Of Health Services	3858	03 - Increase the percent of women (ages 40+) who have had a Mammogram in the past 2 years from 73.90% to 80% by June 2017.	03
CCC-2013 - 2014 1205	Arizona Department Of Health Services	3858	03 - Increase the percent of women (ages 40+) who have had a Mammogram in the past 2 years from 73.90% to 80% by June 2017.	03

After saving your search, you can access it using the *My Search Criteria* page or the *Shared Search Criteria* page (if you chose to share it).

The screenshot shows the 'Search: Shared Search Criteria' page. At the top, there are tabs for 'System Admin', 'FOAs & Recipients', and 'Search'. Below the tabs, there are links for 'My Search Criteria', 'Shared Search Criteria', and 'Pre-Defined Reports'. A yellow callout box points to 'Previous' and 'Next' buttons, stating: 'Use the Previous and Next buttons to navigate between pages.' Below this is a search bar with a dropdown menu for 'FOA' set to 'View All'. A table lists search criteria with columns: Search Name, FOA, Topic and Type, Search Description, and Shared. A yellow callout box points to the 'FOA' dropdown, stating: 'Select an FOA to view the search criteria associated with the specific FOA'. Another yellow callout box points to the 'view results | edit | delete' links in the table, stating: 'Select the applicable link to generate results, edit or delete a specific search criteria'. The table contains four rows of search criteria.

Search Name	FOA	Topic and Type	Search Description	Shared
1205 yr1 PM 4.2 other govt entities	Comprehensive Cancer Control (DP12-1205)	Resources: Partnerships/Coalitions - Response Options	1205 yr 1 PM 4.2 otehr govt entities	Yes view results edit
1205 yr1 PM 4.2 other govt entities updated	Comprehensive Cancer Control (DP12-1205)	Resources: Partnerships/Coalitions - Response Options	1205 yr 1 PM 4.2 other govt entities - updated April 2014	Yes view results edit
1st Breast cancer search 07/07/2014 - Shared	Community Transformation Grants, Comprehensive Cancer Control (DP12-1205, DELTA FOCUS (CE13-1302)	Action Plan: Action Plan (Search All) - Keyword	Programs focused on breast cancer in Ohio, Connecticut, and Arizona.	Yes view results edit delete
6.3 Yr 4 Action Plan AOs	Comprehensive Cancer Control (DP07-703)	Action Plan: Annual Objectives and Progress - Keyword	Keyword - Evidenced based	Yes view results edit

The *My Search Criteria* list page displays the following information for each search:

- **Search Name:** The unique name of the search.
- **FOA:** The Funding Opportunity Announcement(s) included in the search criteria.
- **Topic and Type:** The MIS section included in the search criteria and the type of search.
- **Search Description:** The description of the search. When you hover over the mouse over the description, the complete description in addition to when it was created, and when it was last updated is visible.
- **Shared:** Indicates whether the search is shared or not.



Note

- Search criteria are listed in ascending alphabetical order by Search Name, Topic and Type.

In addition, from the *Search Criteria* list page, the following actions can be performed:

- **view results:** Executes the search criteria and displays the Search Results pages as described in “View Search Results”.
- **edit:** Opens the search criteria to allow modifications.
- **delete:** Removes search criteria.
- **FOA:** Filters the list of search criteria to those for the selected FOA. The selection defaults to ‘View All’ FOAs. You can select a particular FOA from the drop-down list to view the search criteria applicable to that FOA only.

Pre-Defined Reports

Pre-Defined Reports provide a quick and easy way for CDMIS users to access data across tabs. The Office of Informatics and Information Resource Management within the National Center for Chronic Disease Prevention will continue to work with all programs that use CDMIS to provide reports that provide useful information that assist in fulfilling CDC's public health mission.



These reports do not replace the reports currently required by PGO for your FOA.

The Recipient Status Report

The Recipient Status Report is a Pre-Defined report that displays the total number of objectives by the Objective's Target Met status for each recipient.

To run the Recipient Status Report:

1. Click the *Search* tab.

Result: The system displays the *Search: My Search Criteria* page.

Click the Pre-Defined Reports link to run a Pre-Defined Report.

My Search Criteria | Shared Search Criteria | Pre-Defined Reports

Search: My Search Criteria

Start new search

FOA: View All

▼ Search Name	FOA	Topic and Type	Search Description
1st Breast cancer search 07/07/2014 - Shared	Community Transformation Grants, Comprehensive Cancer Control (DP12-1205, DELTA FOCUS (CE13-1302)	Action Plan: Action Plan (Search All) - Keyword	Programs focused on breast Ohio, Connecticut, and Arizo

2. Click the **Pre-Defined Reports** link.

Result: The system displays the *Pre-Defined Reports* page, which allows you to run the Recipient Status Report, a report that displays the total number of objectives for each recipient.

System Admin | FOAs & Recipients | Search

My Search Criteria | Shared Search Criteria | **Pre-Defined Reports**

Pre-Defined Reports

Pre-Defined Reports provide a quick and easy way for CDMIS users to access data across tabs. These reports do not replace reports currently required by PGO for your FOA.

The Office of Informatics and Information Resource Management (OIIRM) within the National Center for Chronic Disease Prevention will continue to work with all programs that use CDMIS to provide reports that provide useful information that assist in fulfilling CDC's public health mission.

Recipient Status Report



The Recipient Status Report displays the total number of objectives by the Objective's Target Met status for each recipient.

[Create Report](#)

- Click the **Create Report** button.

Result: The system displays the *Pre-Defined Reports: Recipient Status Report* page.

System Admin | FOAs & Recipients | Search

My Search Criteria | Shared Search Criteria | **Pre-Defined Reports**

Pre-Defined Reports: Recipient Status Report

The Recipient Status Report displays the total number of objectives by the Objective's Target Met status for each recipient.



Select Filter Options

*FOA:

*Recipient(s):

*Report Year:

*Report Type:

*Report Status: Draft Finalized

[Submit](#) [Reset](#)

- In the *FOA* field, select the FOA to use for the search from the available FOAs in the system.
Result: After completing this field, the system populates the *Recipient* field based on your selection.

System Admin | FOAs & Recipients | Search

My Search Criteria | Shared Search Criteria | **Pre-Defined Reports**

Pre-Defined Reports: Recipient Status Report

The Recipient Status Report displays the total number of objectives by the Objective's Target Met status for each recipient.

Select Filter Options

*FOA: DELTA FOCUS (CE13-1302)

*Recipient(s): All Recipients
Alaska Network on Domestic Violence and Sexual Assault
California Partnership to End Domestic Violence
Delaware Coalition Against Domestic Violence

*Report Year: Select One

*Report Type:

*Report Status: Draft Finalized

Submit Reset

The Recipient(s) list is populated based on the selected FOA.

5. From the *Recipient(s)* list, select the recipients to include in the search.

Result: The system populates the *Report Year* field with the available report years for the selected recipients.

System Admin | FOAs & Recipients | Search

My Search Criteria | Shared Search Criteria | **Pre-Defined Reports**

Pre-Defined Reports: Recipient Status Report

The Recipient Status Report displays the total number of objectives by the Objective's Target Met status for each recipient.

Select Filter Options

*FOA: DELTA FOCUS (CE13-1302)

*Recipient(s): All Recipients
Alaska Network on Domestic Violence and Sexual Assault
California Partnership to End Domestic Violence
Delaware Coalition Against Domestic Violence

*Report Year: Select one
2015 - 2016
2014 - 2015
2013 - 2014

*Report Type:

*Report Status: Draft Finalized

Submit Reset

The Report Year list is populated based on the selected recipient(s).

**Note**

- To select several recipients, hold down the CTRL key (to select non-consecutive recipients) or the SHIFT key (to select consecutive recipients) and select the recipients.

6. In the *Report Year* field, select a year to report on.

Result: The system populates the *Report Type* field with the available report types for the selected report year.

System Admin
FOAs & Recipients
Search

[My Search Criteria](#) | [Shared Search Criteria](#) | **Pre-Defined Reports**

Pre-Defined Reports: Recipient Status Report

The Recipient Status Report displays the total number of objectives by the Objective's Target Met status for each recipient.

Select Filter Options

*FOA:

*Recipient(s):
Alaska Network on Domestic Violence and Sexual Assault
California Partnership to End Domestic Violence
Delaware Coalition Against Domestic Violence

*Report Year:

*Report Type:
IPR
APR

*Report Status: Draft Finalized

The Report Type list is populated based on the selected report year

7. In the *Report Type* field, select a report type.

8. In the *Report Status* field, select the *Draft* check box to include only data in the draft status in the report, select *Finalized* to include only data in the finalized status in the report, or select both check boxes to include both draft and finalized data in the report.

9. Click the **Submit** button.

Result: The system displays the *Recipient Summary Report* based on the selected search criteria. The data is displayed in table and chart formats.

Chronic Disease MIS Pre-Defined Reports

Recipient Status Report

FOA: DELTA FOCUS (CE13-1302)

Recipient(s): California Partnership to End Domestic Violence, Florida Coalition Against Domestic Violence, Michigan Coalition to End Domestic and Sexual Violence, Ohio Domestic Violence Network

Report Year: 2013–2014 | Report Type: IPR | Report Status: Draft, Finalized

Date Generated: July 09, 2014

The top of the report displays the selected search criteria.

Table | Chart

Click the Chart link to view the data in chart format.

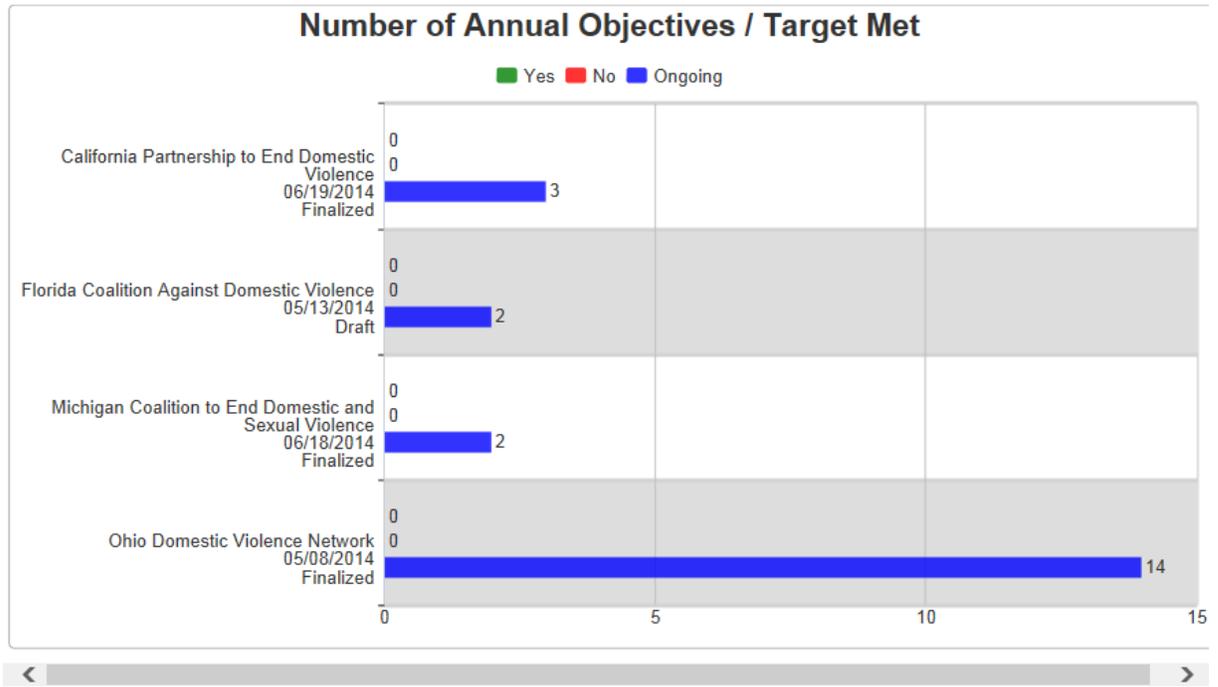
Export to Excel

Click the export displayed data to Excel.

Recipients	Last Update to AO Progress	Report Status	Number of Annual Objectives/Target Met?		
			Yes	No	Ongoing
California Partnership to End Domestic Violence	06-19-2014	Finalized	0	0	3
Florida Coalition Against Domestic Violence	05-13-2014	Draft	0	0	2
Michigan Coalition to End Domestic and Sexual Violence	06-18-2014	Finalized	0	0	2
Ohio Domestic Violence Network	05-08-2014	Finalized	0	0	14

Table | Chart

Click the Table link to view the data in table format.



Viewing the Recipient Status Report

The Recipient Status Report is divided into three sections: selected search criteria, table, and chart.

Selected Search Criteria

The top of the report displays the selected search criteria that produced the report.
Recipient Status Report

FOA: DELTA FOCUS (CE13-1302)

Recipient(s): California Partnership to End Domestic Violence, Florida Coalition Against Domestic Violence, Michigan Coalition to End Domestic and Sexual Violence, Ohio Domestic Violence Network

Report Year: 2013–2014 | Report Type: IPR | Report Status: Draft, Finalized

Date Generated: July 09, 2014

Recipient Status Report in table format

The middle section of the report displays the report data in table format. You can click the **Chart** link to display the data in chart format. The chart displays the data in the report in columns. The columns display the recipients, the date the annual objective progress was last updated, the number of annual objectives that are met, not met, and ongoing. The table also specifies if the annual objective is finalized or not.

You can click the **Export to Excel** button to export the report data into Excel.

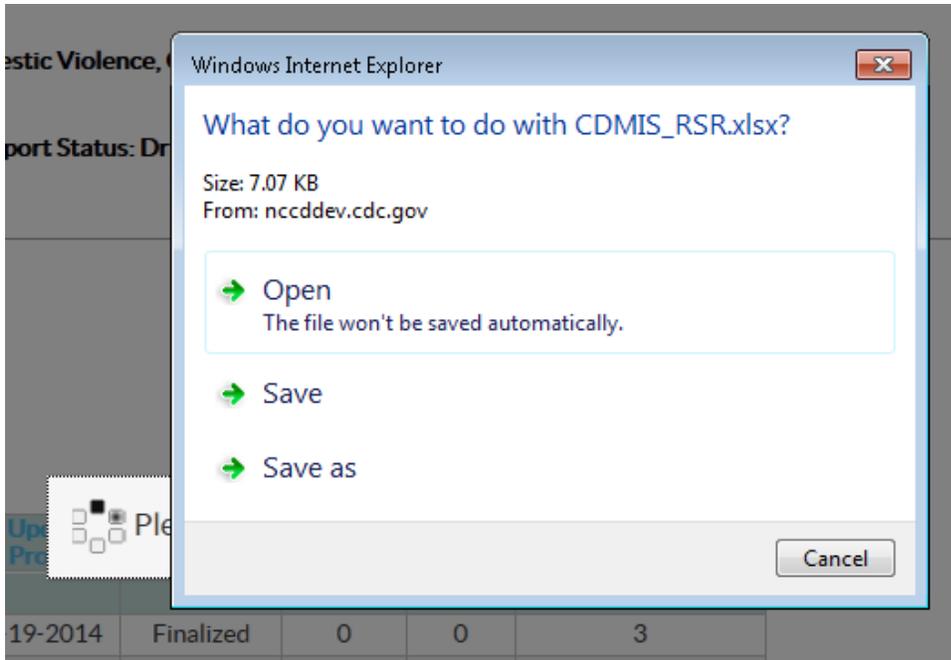
Table | Chart

Export to Excel

Recipients	Last Update to AO Progress	Report Status	Number of Annual Objectives/Target Met?		
			Yes	No	Ongoing
California Partnership to End Domestic Violence	06-19-2014	Finalized	0	0	3
Florida Coalition Against Domestic Violence	05-13-2014	Draft	0	0	2
Michigan Coalition to End Domestic and Sexual Violence	06-18-2014	Finalized	0	0	2
Ohio Domestic Violence Network	05-08-2014	Finalized	0	0	14

Export to Excel

Click the Export to Excel button to export the displayed data into Excel. The system displays a pop-up window that allows you to specify how you want to export the data. You can click **Open** to open the data and view it. When you select this option, the data will not be saved automatically. You can also click **Save** to view the data and then save it. Click the **Save As** option to save the data into an Excel document.



Recipient Status Report in chart format

The lower section of the report displays the Pre-Defined Report in bar chart format. If an objective target has been met, the system displays a green bar for the objective. If the target has not been met, the system displays a red bar for the objective. A blue bar indicates that the objective is ongoing. Each sub-section displays a selected recipient’s number of annual objectives, the date the objective was met, and specifies whether the objective is finalized or not. Click the **Table** link to return to the Table section in the middle of the page.

Table | Chart

