



## Search Module

## Grantees

Version 3.0



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## Introduction

Use the *Search* tab to specify criteria for searching data search for data across all the FOAs to which you have access, and also access shared search criteria created by other users within your organization. When running a search, the system guides you through a series of steps required for specifying search criteria. At the end of this process, you will have the option to save and/or print the results. Saved searches can be shared if desired. The tab consists of two sections:

- **My Search Criteria:** used to add, edit, delete, and view the results of searches created by you.
- **Shared Search Criteria:** used 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.



Pre-Defined Reports do not replace the reports currently required by PGO for your FOA.

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## My Search Criteria

Use the *My Search Criteria* subsection under the *Search* tab to add, edit, delete, and view the results of searches created by you. 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.

Upon initial entry into the summary page, there are no searches displayed if you have not created any.

The screenshot shows the 'My Search Criteria' page. At the top, there are two tabs: 'FOAs & Recipients' and 'Search'. Below the tabs is a breadcrumb trail: 'My Search Criteria | Shared Search Criteria | Pre-Defined Reports'. The main content area is titled 'Search: My Search Criteria'. There is a link 'Start new search' with a callout box pointing to it that says 'Click this link to initiate a search.' Below this, the text 'FOA:' is followed by 'No information entered.' with a callout box pointing to it that says 'The list of search criteria is empty until at least one has been created and saved.'

After searches have been created, the system displays for each search, the search name, 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.

The screenshot shows the 'My Search Criteria' page. At the top, there are tabs for 'FOAs & Recipients' and 'Search'. Below the tabs, there are links for 'My Search Criteria', 'Shared Search Criteria', and 'Previous'. The main heading is 'Search: My Search Criteria'. There is a 'Start new search' link and an 'FOA: View All' dropdown menu. Below this, it says 'Show 25 entries' and 'Showing 1 - 25 of 173'. A search input field is on the right. The main content is a table with columns: Search Name, FOA, Topic and Type, Search Description, and Shared. The first row is highlighted. A red circle highlights the 'view results | edit' link in the first row. Callout boxes provide instructions: 'Click on a column heading to sort the search results by the specific heading' (pointing to the 'Search Name' column), 'Select the applicable link to generate results, edit or delete a specific search criteria.' (pointing to the 'view results | edit' link), 'Select an FOA to view the search criteria associated with the selected FOA.' (pointing to the 'FOA' column), and 'Hover mouse above the Search Description for additional information about the search criteria.' (pointing 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 <a href="#">view results</a>   <a href="#">edit</a>
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 <a href="#">view results</a>   <a href="#">edit</a>
6.3 Yr 4 Action Plan AOs	Comprehensive Cancer Control (DP07-703)	Action Plan: Annual Objectives and Progress - Keyword	Keyword - Evidenced based	Yes <a href="#">view results</a>   <a href="#">edit</a>
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 <a href="#">view results</a>   <a href="#">edit</a>
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 <a href="#">view results</a>   <a href="#">edit</a>
703 CCC PM 2.2 yr4 other organizations YR 5	Comprehensive Cancer Control (DP07-703)	Resources: Partnerships/Coalitions - Response Options	This query includes all CCC programs and provides the organization name, part...	Yes <a href="#">view results</a>   <a href="#">edit</a>
703 CCC PM 2.2 yr5	Comprehensive Cancer Control (DP07-703)	Resources: Partnerships/Coalitions - Response Options	This query includes all CCC programs and provides the organization name, part...	Yes <a href="#">view results</a>   <a href="#">edit</a>

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 tabs for 'FOAs & Recipients' and 'Search'. Below the tabs, there is a search bar with 'Search: Shared Search Criteria' and a 'Start new search' link. A dropdown menu for 'FOA' is set to 'View All'. Below this, there is a table of search criteria. The table has columns for 'Search Name', 'FOA', 'Topic and Type', 'Search Description', and 'View Results | Edit'. The first row is highlighted. Callout boxes provide instructions: 'Select an FOA to view the search criteria associated with the selected' points to the FOA dropdown; 'Click on a column heading to sort the search results by the specific heading' points to the 'Search Name' column header; 'Select the applicable link to view results, edit or delete a specific search criteria' points to the 'view results | edit' link in the first row; and '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	View Results   Edit
1205 yr1 PM 4.2 other govt entities	Comprehensive Cancer Control (DP12-1205)	Resources: Partnerships/Coalitions - Response Options	1205 yr 1 PM 4.2 oter govt entities	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	view results   edit
6.3 Yr 4 Action Plan AOs	Comprehensive Cancer Control (DP07-703)	Action Plan: Annual Objectives and Progress - Keyword	Keyword - Evidenced based	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...	view results   edit
703 CCC PM 2.2 yr4 businss/industry YR5	Comprehensive Cancer Control (DP07-703)	Resources: Partnerships/Coalitions - Response Options	This query includes all 703 CCC programs, organization and businss/industry ...	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 includes all CCC programs and provides the organization name, part...	view results   edit
703 CCC PM 2.2 yr5 other gov agencies	Comprehensive Cancer Control (DP07-703)	Resources: Partnerships/Coalitions - Response Options	This query includes all CCC programs and provides the organization name, part...	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 the View Search Results section on page 17.
  - **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. 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 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 *Search* tab.

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



FOAs & Recipients Search

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

Search: My Search Criteria

[Start new search](#)

FOA:

No information entered.

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

**Result:** The system displays the required search criteria fields.

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. In the *Search By* field, select *Response Options*

5. 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

6. In the *Years* field, select the year(s) to use for the search. The years displayed are determined based on the FOAs selected.
7. 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.

Type Organization Name to see matching Organizations

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

Selected organization(s)

Selected Organization Names	
Arizona Department Of Health Services	<a href="#">clear</a>
Connecticut Department Of Public Health	<a href="#">clear</a>
Ohio Department of Health	<a href="#">clear</a>

Continue Cancel



**Note**

- 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.

8. Click **Continue**.

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

**Search: New Search Criteria**

Created By: Ruby Silvestriana Date Created: 07/09/2014 Date Updated:

Selected topic

**Step 2: Select Response Options**

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

**\*Response Options:**

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

<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"/> Hawaii	<input type="checkbox"/> Tennessee
<input type="checkbox"/> Idaho	<input type="checkbox"/> Texas
<input type="checkbox"/> Illinois	<input type="checkbox"/> Utah
<input type="checkbox"/> Indiana	<input type="checkbox"/> Vermont
<input type="checkbox"/> Iowa	<input type="checkbox"/> Virginia
<input type="checkbox"/> Kansas	<input type="checkbox"/> Washington
<input type="checkbox"/> Louisiana	<input type="checkbox"/> West Virginia

**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

Click here to change the selected topic.

**Step 3: Select Fields to Display in Results**

**\*Fields to Display:**

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

<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)
<input type="checkbox"/> Website Address	<input type="checkbox"/> Program Shipping Address (State)
<input type="checkbox"/> Program Mailing Address (Line 1)	<input type="checkbox"/> Program Shipping Address (ZIP)

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



**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. 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.

## Steps 2 and 3: Response Options, Keywords, 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.

FOAs & Recipients Search

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

**Search: Results**

Created By: Ruby Silvestriana Date Created: 07/09/2014 Date Updated: Date Run: 07/09/2014

**Summary (Modify Search Criteria)**

Search Name:

**Search By:** Response Option

**Topic(s):** Program Information - Contact Information | **Organizations:** 3 Selected, 1 Found

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

**Detailed Results (3 Results)** [Save Search Criteria](#)

FOA Years	Organization Name	Grantee Number	Telephone	FAX	Program Mailing Address (State)	Program Ma
CCC-2014 - 2015 1205	Arizona Department Of Health Services	3858	6025421222	6025420512	AZ	85007
CCC-2013 - 2014 1205	Arizona Department Of Health Services	3858	6025421222	6025420512	AZ	85007
CCC-2012 - 2013 1205	Arizona Department Of Health Services	3858	6025421222	6025420512	AZ	85007

[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 <b>breast</b> 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	<b>Cervical</b> and skin <b>cancers</b> 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 <b>prostate cancer</b> 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 the selected topic for both words before and after AND	Lung AND tobacco	Reduce incidences of <b>lung</b> diseases caused by <b>tobacco</b> 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 <b>colorectal</b> cancer prevention
Using “OR” with multiple operators	If <b>OR</b> is used in any operator combinations (e.g. Keyword1 <b>AND</b> Keyword2 <b>OR</b> Keyword3) <b>OR</b> will replace any <b>AND</b> operator.  Example: “Breast <b>AND</b>	Breast AND cancer OR cervical	<b>Cancer</b> screening using the Pap smear can identify precancerous changes in <b>cervical</b> cells

	cancer <b>OR</b> cervical” searches results for “Breast” <b>OR</b> “Cancer” <b>OR</b> “Cervical”.		
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## 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.

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

**Result:** The system displays the required search criteria fields.

FOAs & Recipients | Search

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

**Search: New Search Criteria**

Created By: Ruby Silvestriana | Date Created: 07/09/2014 | 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  
 Comprehensive Cancer Control (DP12-1205)  
 DELTA FOCUS (CE13-1302)

\*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 37 available  
 Type Organization Name to see matching Organizations  
 Select All | Clear All  
**Selected Organization Names**  
 None Selected.

Continue Cancel

- In the *FOA* field, select the FOA(s) to use for the search from the available FOA(s) in the system. 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:** After completing this field, the system populates the *Topic* field based on your selection
- In the *Search By* field, select *Keyword*.
- 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:

\*Years:

\*Organization Name:

Select One

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.

\*Years:

Select All | Clear All

2015-2016

2014-2015

2013-2014

2012-2013

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

\*Organization Name:

Type Organization Name to see matching Organizations

3 selected of 37 available

Select All | Clear All

**Selected Organization Names**

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

Selected organization(s)



**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*.

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 interface with the following elements and annotations:

- Search: New Search Criteria** header with metadata: Created By: Ruby Silvestriana, Date Created: 07/09/2014, Date Updated: [blank].
- Step 2: Select Keywords** section:
  - \*Topic: You selected **Action Plan - Action Plan (Search All)**. A yellow box labeled "Selected topic" points to this text.
  - \*Keyword: An input field with a "Show Search Tips" dropdown. A yellow box labeled "Click here to change the selected topic." points to the dropdown.
- Step 3: Select Fields to Display in Results** section:
  - \*Fields to Display: A list of checkboxes. The first four are checked: FOA, Years, Organization Name, and Grantee Number. A yellow box labeled "Click here more information about entering keywords" points to the keyword input field above.
  - Buttons: "Select All", "Clear All", and "4 Selected".
  - Bottom buttons: "Generate Results >>", "<< Previous", and "Cancel".



**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: Select Keywords/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 12.
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.
- 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.

FOAs & Recipients
Search

My Search Criteria
Shared Search Criteria
Pre-Defined Reports

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

**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	Proj
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 <b>breast cancer</b> 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 <b>breast cancer</b> 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 <b>breast cancer</b> screenings. from 0 to 3 by June 2014.	03

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.

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 <b>breast cancer</b> 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 <b>breast cancer</b> 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 <b>breast cancer</b> 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 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.

FOAs & Recipients
Search

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

### Search: Results - Breast Cancer Search

Created By: Ruby Silvestriana    Date Created: 07/09/2014    Date Updated:    Date Run: 07/09/2014

**Summary (Modify Search Criteria)**

Search Name: Breast Cancer Search Name assigned to search criteria.

**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 <b>breast cancer</b> 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 <b>breast cancer</b> 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 <b>breast cancer</b> screenings. from 0 to 3 by June 2014.	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).

Search: Shared Search Criteria

Start new search

FOA:

Show 25 entries Showing 1 - 4 of 4

Search Name	FOA	Topic and Type	Search Description	Shared
Angellique's	Collaborative	Resources: Personnel - Keyword	Resources: Partnerships/Coalitions - Response Options	Yes <a href="#">view results</a>   <a href="#">edit</a>
Breast Cancer Search	Comprehensive Cancer Control (DP12-1205, DELTA FOCUS (CE13-1302)	Action Plan: Action Plan (Search All) - Keyword	This search tracks the PPOs and AOs for breast cancer from 2011 to 2014.	Yes <a href="#">view results</a>   <a href="#">edit</a>   <a href="#">delete</a>
Internet Response Option	DELTA FOCUS (CE13-1302)	Program Information: Program Summary - Response Options	Resources: Partnerships/Coalitions - Response Options	Yes <a href="#">view results</a>   <a href="#">edit</a>
Products	Collaborative, Coordinated Chronic Disease Prevention and Health Promotion	Action Plan: Annual Objective Products - Response Options	All Healthy Communities and Coordinated CD products since 2009.	Yes <a href="#">view results</a>   <a href="#">edit</a>

◀ Previous Next ▶

Select the applicable link to generate results, edit or delete a specific search criteria

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.
- **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.

FOAs & Recipients Search

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

**Search: My Search Criteria**

[Start new search](#)

**FOA:**

Search Name	FOA	Topic and Type
Breast Cancer Search	Comprehensive Cancer Control (DP12-1205, DELTA FOCUS (CE13-1302))	Action Plan: Action Plan (Search All) - Keyword

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.

FOAs & Recipients Search

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[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.

- Click the **Create Report** button.

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

FOAs & Recipients Search

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[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

4. 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.

**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: [Dropdown]

\*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.

**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: [Dropdown]

\*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.

The screenshot displays the 'Pre-Defined Reports: Recipient Status Report' interface. At the top, there are navigation tabs for 'FOAs & Recipients' and 'Search'. Below this is a breadcrumb trail: 'My Search Criteria | Shared Search Criteria | Pre-Defined Reports'. The main heading is 'Pre-Defined Reports: Recipient Status Report'. A descriptive text states: 'The Recipient Status Report displays the total number of objectives by the Objective's Target Met status for each recipient.' Below this is a 'Select Filter Options' section. It contains several filter fields:
 

- \*FOA: A dropdown menu showing 'DELTA FOCUS (CE13-1302)'.
- \*Recipient(s): A dropdown menu with options: 'All Recipients', 'Alaska Network on Domestic Violence and Sexual Assault', 'California Partnership to End Domestic Violence' (highlighted), and 'Delaware Coalition Against Domestic Violence'.
- \*Report Year: A dropdown menu showing '2013 - 2014'.
- \*Report Type: A dropdown menu with options: 'Select one', 'IPR', and 'APR'. A yellow callout box with a line pointing to this dropdown contains the text: 'The Report Type list is populated based on the selected report year.'
- \*Report Status: A checkbox labeled 'Finalized'.

 At the bottom of the filter section are 'Submit' and 'Reset' buttons.

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.

The top of the report displays the selected search criteria.

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

Table | Chart

Export to Excel

Click the export displayed data to Excel.

view the

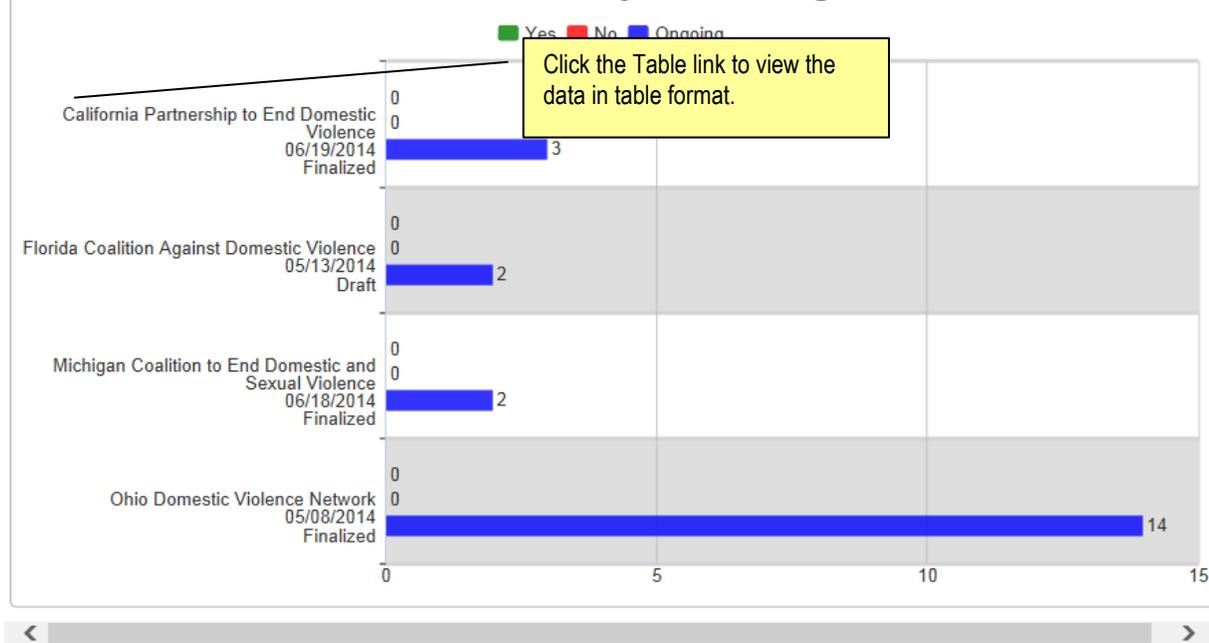
Recipients	Last Activity	IPR	Yes	No	Ongoing	Annual Objectives/Target Met?
California Partnership to End Domestic Violence			0	0	3	
Florida Coalition Against Domestic Violence			0	0	2	
Michigan Coalition to End Domestic and Sexual Violence			0	0	2	
Ohio Domestic Violence Network	05-08-2014	Finalized	0	0	14	

Click the export displayed data to Excel.

Table | Chart

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

### Number of Annual Objectives / Target Met



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.

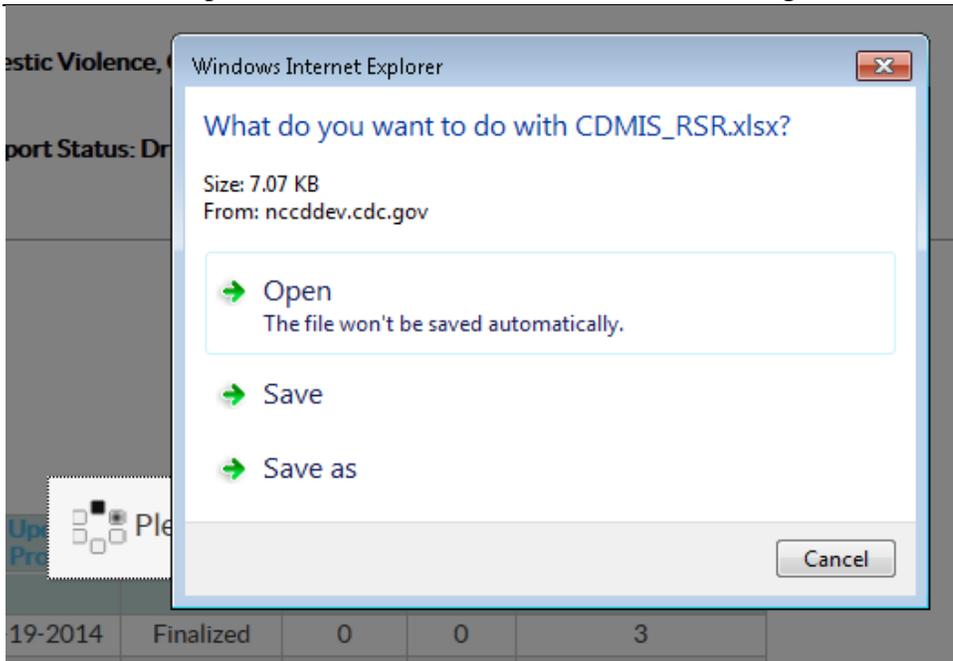
Table | Chart

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](#)

