Department Level Searches

The following are examples of how to create a custom “search” that will extract data at an agency and/or IHE level. These can be created and saved as a Custom Search. When a user runs a search, the data can then be exported to Excel where the data can be manipulated and sorted as desired/needed. The results returned from the custom search will only display data the user has access to see.

- **Example #1: A user is interested in knowing what Purchase Orders their department currently has in CMS. The User wants to know the following information:**
  - Contract ID (CMS ID #)
  - Effective Date
  - Contractor/ Vendor
  - Is this Contract/Grant ultimately for Goods or for Services?
  - CUMULATIVE Maximum Contract Dollar Amount
  - Contract Purpose
  - Purchase Category
  - Contract Type

  - These are the steps the user would take:

STEP 1: Go to: Reports – Custom Searches – Create a Custom Search

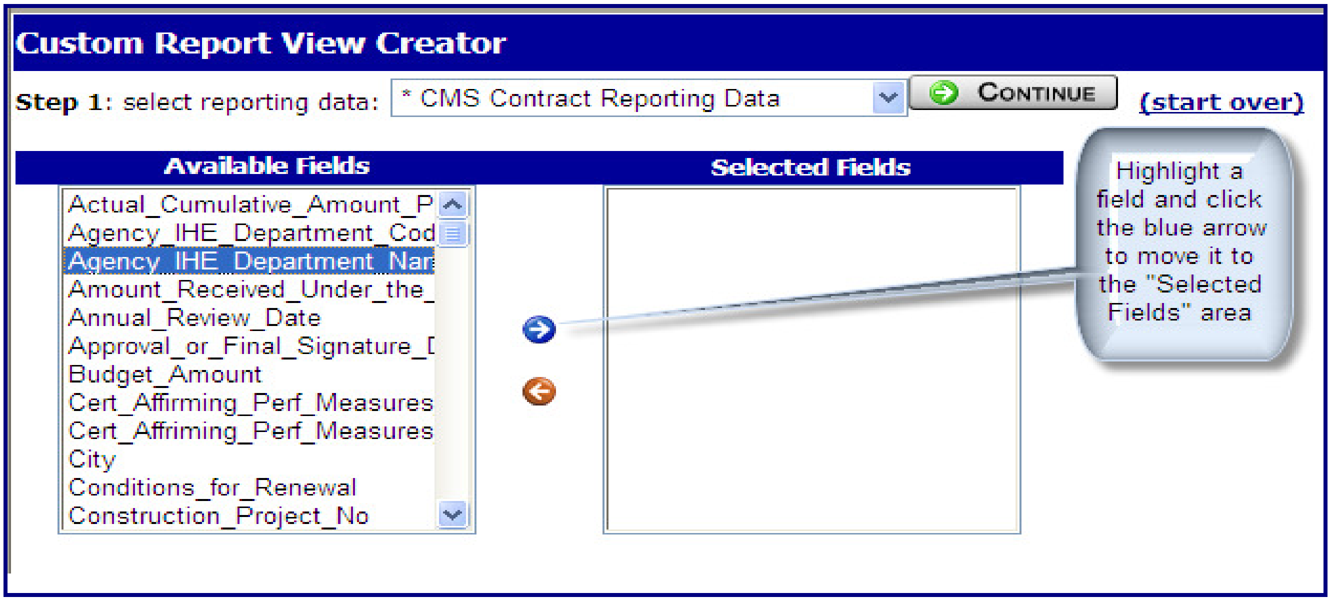
STEP 2: Select ***CMS Contract Reporting Data** and Click Continue

STEP 3:

Select the fields to include in the search by highlighting the field from the “Available Fields” column and clicking on the blue arrow to move it to the “Selected Fields” column. Multiple fields can be selected at one time by holding down the Control key (Ctrl) and clicking on each field. Please note that the order in which fields are selected is the same order in which they will appear on the screen from left to right.

To remove fields from the Selected Fields area, simply reverse the process by highlighting the field(s) and clicking on the Red arrow.

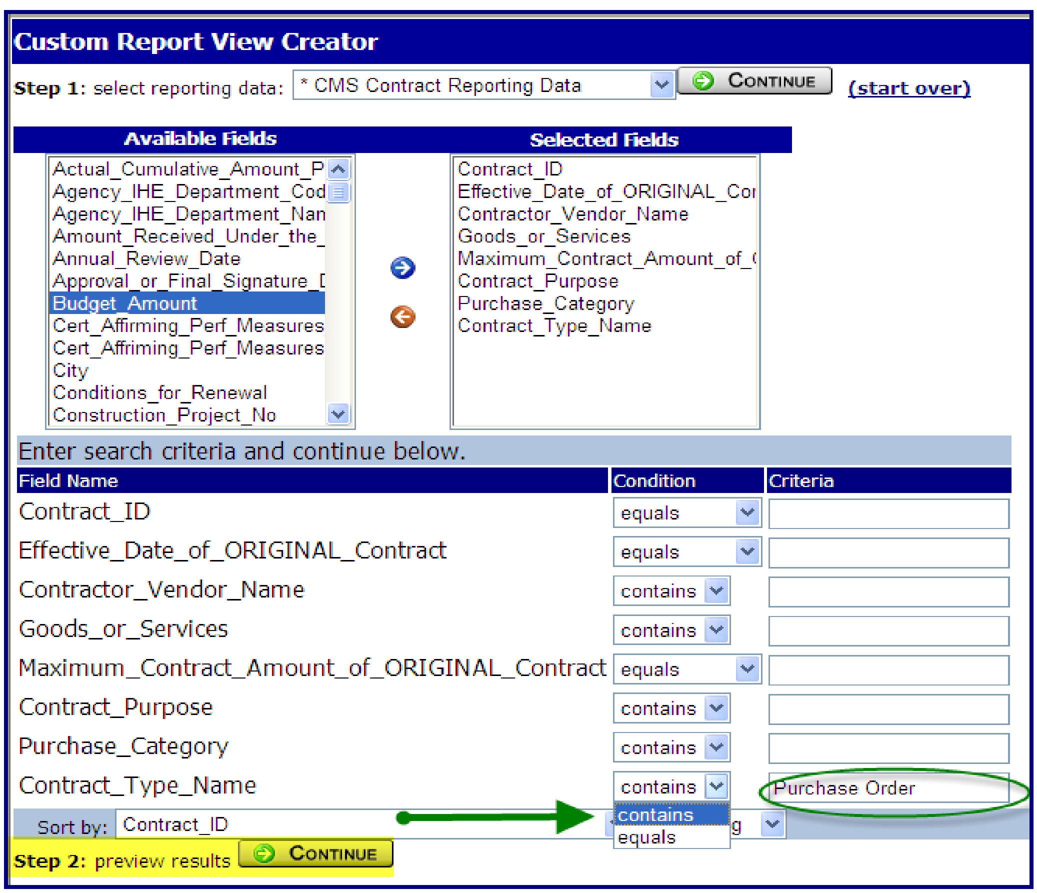
BONUS: A cheat sheet of “common” or “short name” for each listed Available Field will be provided to assist in field selection. These short names will correlate to the actual field labels seen when entering a contract record. These short names will also be added to the help bubbles sometime in June, 2010.



STEP 4:

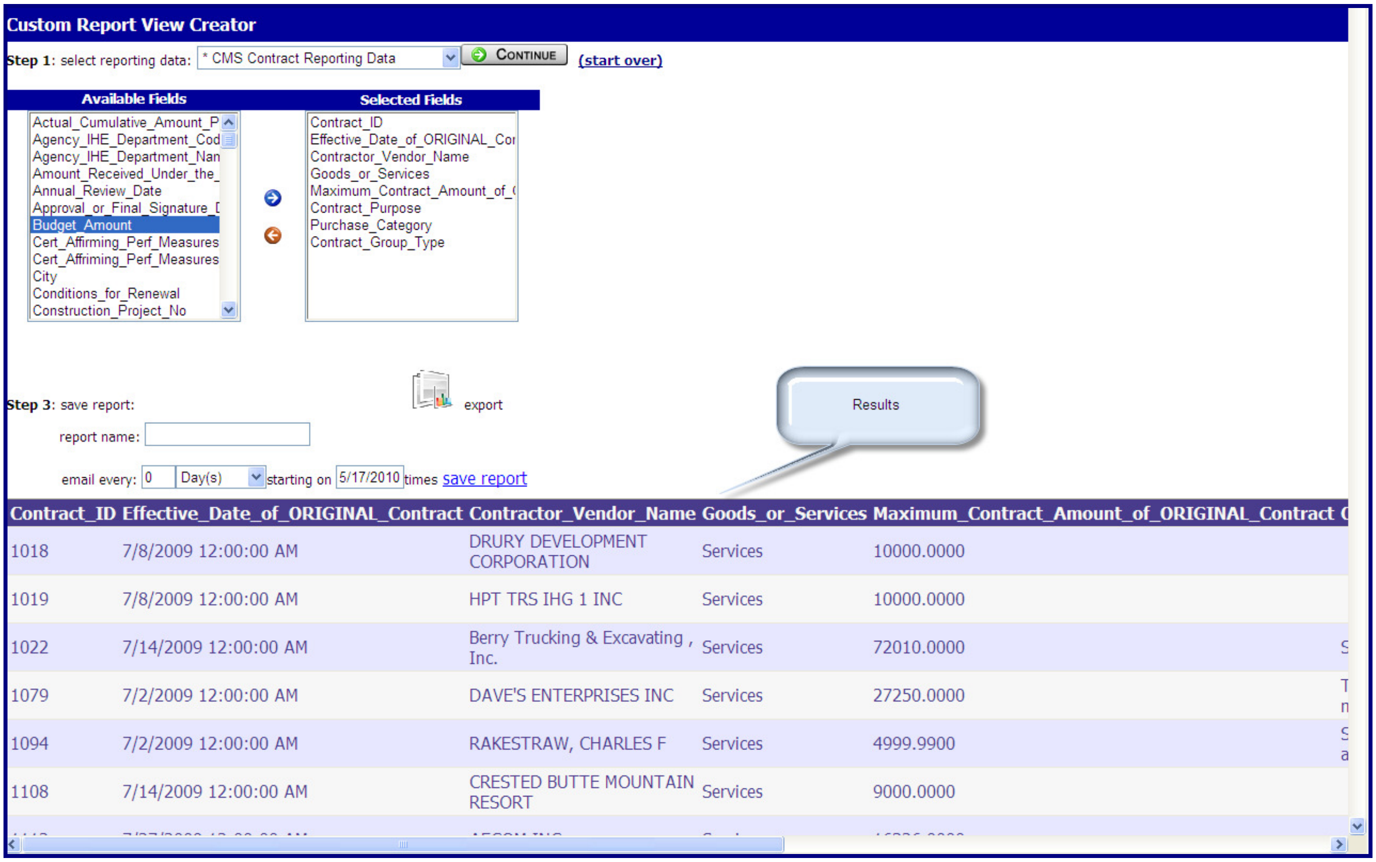
Once all of the fields have been selected, choose any needed filter criteria. Be aware that it is the criteria that determines what information the system filters out of the final results. As such, it is recommended that very few, if any, filter criteria are used. Filter criteria can only be set ONCE. They cannot be changed once the search is saved. Each time the search is subsequently run, the same criteria will be applied. Be sure that the criteria selected will be valid each time the search is run.

This example search is for Purchase Orders only. Given this, it is appropriate to set the Contract Group Type to “Purchase Order w/ T&Cs COB-09.” Select the “Contains” filter from the drop down list and type “Purchase Order” in the Criteria column. NOTE: If the “Equals” criteria was used, then the *entire* Contract Group Type name, *exactly* as it appears, would have to be typed into the column. It is much more difficult to get a name typed in exactly correct, so it is recommended to use Contains whenever possible. To check the results of the search, Click on the <Continue> button next to “preview results.



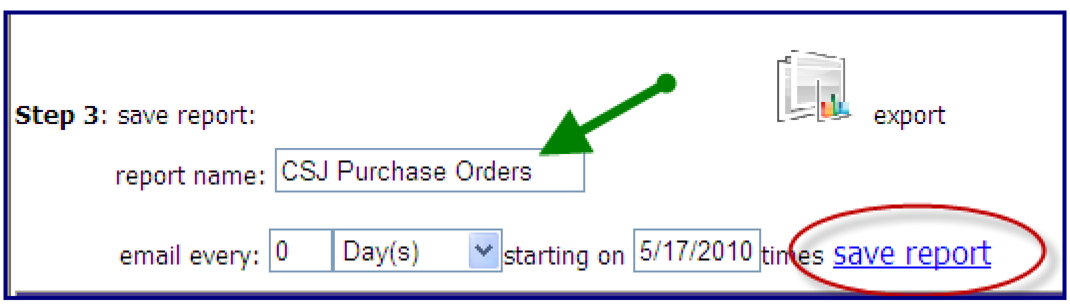
STEP 5:

The search results should now appear at the bottom of the screen. If the expected results do <u>not</u> appear, review the criteria and edit as necessary. Repeat until the results are accurate.



STEP 6:

If this Search will be needed/useful in the future, give the report a name and click on Save. If this is a one time search, click the Export icon and follow the prompts to export the data to Excel where the data can be sorted etc., as needed.



STEP 7:

If the above search <u>was</u> saved and the user wants to run it again, go to: Reports – Custom Searches – My Custom Searches

STEP 8:

Locate the Search in the list of reports and click on the Name

CMS1913	11/16/2009 10:24:47 AM	edit
Contracts with Grant under Goods-Services	7/24/2009 11:35:16 AM	edit
CSJ Purchase Orders	5/17/2010 12:04:49 PM	edit
DEM	7/24/2009 9:09:28 AM	edit
DEM	7/10/2009 4:47:19 PM	edit

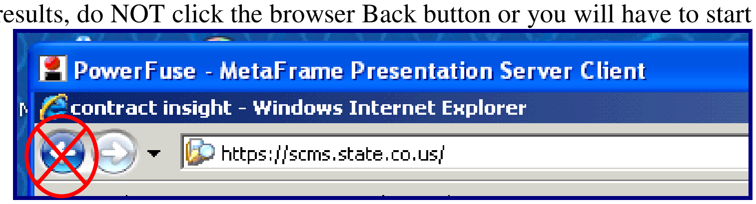
STEP 9:

The data within this search can now be exported by clicking on the Export to Excel link on the far right side of the screen.

<u>Tips and Quirks</u>

→ Know your selection Criteria ahead of time. For example: Know the Department Name or Contract Group Type as it appears in the drop down list in the contract record.

→ Once you preview your search results, do NOT click the browser Back button or you will have to start over.



Instead, add and/or remove a field to show the criteria section of the search definition.

→ All shared reports names will begin with Dept and will end if DO NOT DELETE. It is important for users to not delete these reports. If a report is deleted, it is deleted for ALL users of CMS.

This document will continue to grow. Future additions are anticipated to include:

1. More Examples
2. Use of filters
3. Responses to comments, questions and user needs