



## 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.

## Custom Report View Creator

Step 1: select reporting data: \* CMS Contract Reporting Data CONTINUE (start over)

Available Fields	Selected Fields
<ul style="list-style-type: none"> <li>Actual_Cumulative_Amount_P</li> <li>Agency_IHE_Department_Cod</li> <li>Agency_IHE_Department_Nam</li> <li>Amount_Received_Under_the</li> <li>Annual_Review_Date</li> <li>Approval_or_Final_Signature_I</li> <li>Budget_Amount</li> <li>Cert_Affirming_Perf_Measures</li> <li>Cert_Affirming_Perf_Measures</li> <li>City</li> <li>Conditions_for_Renewal</li> <li>Construction_Project_No</li> </ul>	<div style="border: 1px solid gray; width: 100px; height: 100px;"></div>

Highlight a field and click the blue arrow to move it to the "Selected Fields" area

### 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."

### Custom Report View Creator

Step 1: select reporting data: \* CMS Contract Reporting Data CONTINUE (start over)

Available Fields	Selected Fields
<ul style="list-style-type: none"> <li>Actual_Cumulative_Amount_P</li> <li>Agency_IHE_Department_Cod</li> <li>Agency_IHE_Department_Nam</li> <li>Amount_Received_Under_the</li> <li>Annual_Review_Date</li> <li>Approval_or_Final_Signature_I</li> <li>Budget_Amount</li> <li>Cert_Affirming_Perf_Measures</li> <li>Cert_Affirming_Perf_Measures</li> <li>City</li> <li>Conditions_for_Renewal</li> <li>Construction_Project_No</li> </ul>	<ul style="list-style-type: none"> <li>Contract_ID</li> <li>Effective_Date_of_ORIGINAL_Con</li> <li>Contractor_Vendor_Name</li> <li>Goods_or_Services</li> <li>Maximum_Contract_Amount_of_o</li> <li>Contract_Purpose</li> <li>Purchase_Category</li> <li>Contract_Type_Name</li> </ul>

Enter search criteria and continue below.

Field Name	Condition	Criteria
Contract_ID	equals	
Effective_Date_of_ORIGINAL_Contract	equals	
Contractor_Vendor_Name	contains	
Goods_or_Services	contains	
Maximum_Contract_Amount_of_ORIGINAL_Contract	equals	
Contract_Purpose	contains	
Purchase_Category	contains	
Contract_Type_Name	contains	Purchase Order
Sort by: Contract_ID	contains	
	equals	

Step 2: preview results CONTINUE

**STEP 5:**

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

The screenshot shows the 'Custom Report View Creator' interface. At the top, it says 'Step 1: select reporting data: \* CMS Contract Reporting Data'. Below this are two columns: 'Available Fields' and 'Selected Fields'. The 'Available Fields' list includes items like 'Actual\_Cumulative\_Amount\_P', 'Agency\_IHE\_Department\_Cod', and 'Budget\_Amount'. The 'Selected Fields' list includes 'Contract\_ID', 'Effective\_Date\_of\_ORIGINAL\_Con', and 'Contractor\_Vendor\_Name'. Below the field lists is 'Step 3: save report:' with a text box for 'report name:' and a dropdown for 'email every: 0 Day(s) starting on 5/17/2010 times'. An 'export' icon is also present. A callout box labeled 'Results' points to a table of data.

Contract_ID	Effective_Date_of_ORIGINAL_Con	Contractor_Vendor_Name	Goods_or_Services	Maximum_Contract_Amount_of_ORIGINAL_Con
1018	7/8/2009 12:00:00 AM	DRURY DEVELOPMENT CORPORATION	Services	10000.0000
1019	7/8/2009 12:00:00 AM	HPT TRS IHG 1 INC	Services	10000.0000
1022	7/14/2009 12:00:00 AM	Berry Trucking & Excavating , Inc.	Services	72010.0000
1079	7/2/2009 12:00:00 AM	DAVE'S ENTERPRISES INC	Services	27250.0000
1094	7/2/2009 12:00:00 AM	RAKESTRAW, CHARLES F	Services	4999.9900
1108	7/14/2009 12:00:00 AM	CRESTED BUTTE MOUNTAIN RESORT	Services	9000.0000

**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.

This is a close-up of the 'Step 3: save report:' section. The 'report name:' text box contains 'CSJ Purchase Orders' and has a green arrow pointing to it. The 'email every: 0 Day(s) starting on 5/17/2010 times' section has the 'save report' link circled in red. An 'export' icon is also visible.

**STEP 7:**

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

The screenshot shows the 'contract insight' navigation menu. The menu items are: Home, Contracts, Tasks, Employees, Vendors, Reports, Manage/Setup, Help, Log Out. Below this is a status bar: 'Welcome, today is Monday, May 17, 2010'. To the right of the status bar are links for 'Custom Searches...', 'Create a Custom Search', 'Custom Reports...', and 'My Custom Searches'. The 'My Custom Searches' link is circled in red.

### STEP 8:

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

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

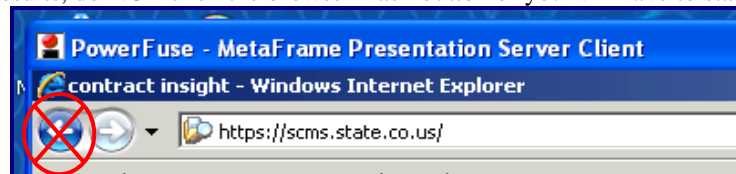
### STEP 9:

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.

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### Tips and Quirks

- 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.

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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