



**VOCABULARY SERVICE (SDP-V)**  
**USER GUIDE**  
**SURVEILLANCE DATA PLATFORM**

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21 July 2017

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## 1 INTRODUCTION AND PURPOSE OF THE SDP-V USER GUIDE

This document serves as a reference for users of the Surveillance Data Platform (SDP) Vocabulary Service (SDP-V) on how to use the application. It also provides background and context on the intent of SDP-V, the types of content it contains, the types of user roles, and the actions users are able to take.

## 2 SDP-V OVERVIEW

SDP-V provides a repository of Questions, Response Sets, SDP-V Forms, and SDP-V Surveys. These content types are described in further detail in Section 2.2.

Content in SDP-V can be created by Authors in the system, imported from documents such as message mapping guides (MMGs)<sup>1</sup>, and synchronized from the Public Health Information Network Vocabulary Access and Distribution System (PHIN VADS)<sup>2</sup>.

These artifacts are accessible to SDP-V users via a graphical user interface (GUI). They are also available to other applications through an application programming interface (API).

### 2.1 SDP-V GOAL

One main goal of SDP-V is to facilitate discovery and reuse of existing vocabulary content, thereby reducing the number of different ways the Centers for Disease Control and Prevention (CDC) asks for the same type of information across programs and surveillance systems. This will help to reduce state, tribal, local, and territorial (STLT) partner reporting burden, as well as drive towards harmonization in data collection instruments.

By making it easy for Authors to see how others have asked for certain types of information before, SDP-V enables Authors to spend less time in data collection instrument creation and more time in data analysis. In other words, by reusing what others have done before, SDP-V can enhance consistency in how questions are asked and answered. Not only is it easier to answer questions asked the same way, this consistency also makes it easier to compare answers and see the big picture. This should allow users to spend less time figuring out how to ask the right question and spend more time doing the important work of analyzing the results.

Figure 1 illustrates the value of SDP-V at a high level.

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<sup>1</sup> Import of content from new documents requires coordination with the SDP-V development team.

<sup>2</sup> PHIN VADS provides standard vocabularies, particularly value sets associated with H7 message implementation guides, to CDC and public health partners. More information about PHIN VADS can be found at <https://www.cdc.gov/phinf/tools/phinvads/index.html>

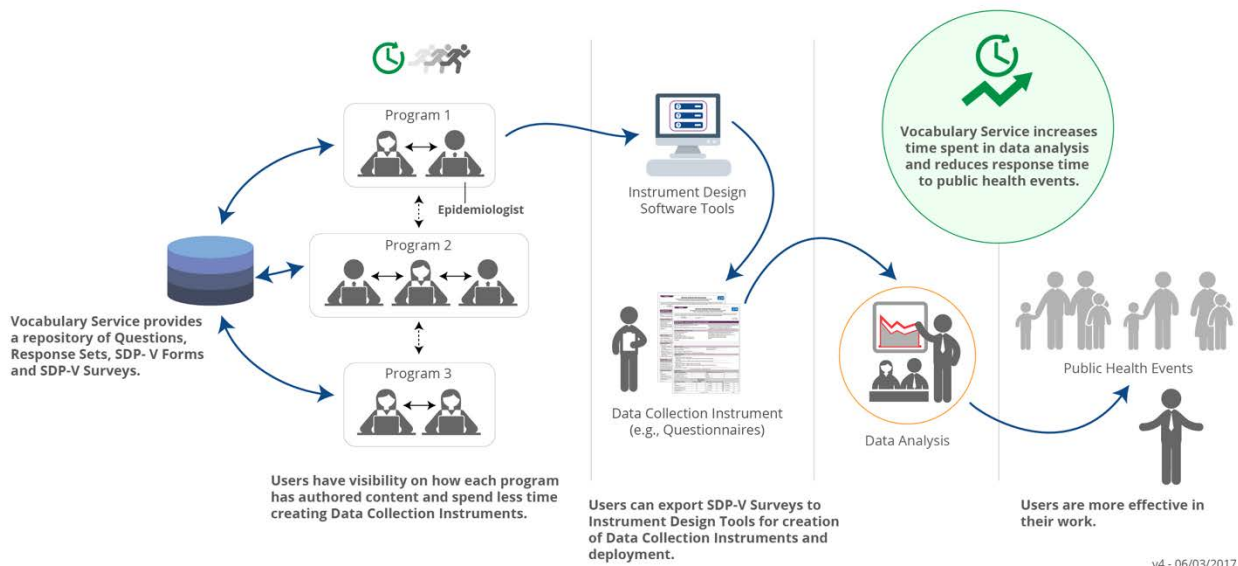


Figure 1 - SDP-V Enables Users to Spend More Time in Data Analysis

## 2.2 TYPES OF CONTENT IN SDP-V

SDP-V serves as a repository and authoring tool for four different types of content: Questions, Response Sets, SDP-V Forms, and SDP-V Surveys. These content types are defined as follows.

**Question** – A natural language expression used to solicit a value for a data variable. Questions in SDP-V may be associated with **Tags**, which are keywords from a controlled vocabulary applied to a question to help facilitate finding relevant questions during a search.

**Response Set** – A set of response choices that are applicable answers to one or more questions.

**SDP-V Form** – A grouping of questions related to a topic (e.g., demographic, clinical, laboratory, epidemiological) and intended to appear together as part of a data collection instrument.

**SDP-V Survey** – One or more SDP-V Forms with questions that are combined together and intended for a data collection instrument or information exchange.

### Draft and Published Content:

SDP-V content can be in either a Draft or Published state. Draft content may be altered or deleted. Published content is permanent; it may be deprecated but may never be deleted. Draft content and Published content have different visibility, as defined below.

**Draft** – When content is newly created in SDP-V, it is in a Draft state. Draft content is only visible to the user who authored it, and to all Publishers in the system. Only the Author of draft content may make changes to it. The Author of draft content can edit this content as desired until it is ready to be sent to a Publisher for review.

**Published** – Completed content that has been reviewed and approved by a Publisher in SDP-V moves into the Published state. Published content is visible to everyone who has

access to SDP-V. The Author of Published content may choose to revise it, creating a new version of the content in a draft state. SDP-V maintains a version history for content so that users can see how content has evolved over time. Other users of SDP-V may choose to extend published content in SDP-V, which means they create a copy of it in a draft state to use as a starting point for their own content. Published content is not necessarily authoritative, and contributions from external (i.e., outside CDC) partners should be coordinated by associated CDC programs.

## 2.3 SYSTEM ROLES AND CAPABILITIES SUMMARY

SDP-V has three defined user roles which allow access to specific content and capabilities. These roles are defined below.

### 2.3.1 VIEWER (PUBLIC)

Anyone may use the Vocabulary service. It is accessible to the public.

A summary of capabilities available to Authors in SDP-V is as follows.

- Able to browse, search, and view details of all published content.

### 2.3.2 AUTHOR (AUTHENTICATED USER)

SDP-V Authors are identified by CDC Programs. To become an SDP-V Author, users go through a CDC SDP-V onboarding process to obtain the needed credentials. The SDP program calls this becoming an “Authenticated User.” Users interested in becoming an Author should contact the SDP program (see Section 6.0).

A summary of capabilities available to Authors in SDP-V is as follows.

- Browse, search, and view details of all published content
- Create new content (considered draft content until published)
- Browse and edit their own draft content
- Create a copy and extend others’ published content
- Request draft content be published

There are several expectations and best practices for the Author role to maximize the value of SDP-V.

- Authors are expected to reuse existing SDP-V content, when possible, to reduce variability and evolve toward harmonization. Where reuse is not practical, Authors should document a justification to share with Publishers.
- When creating new Questions, Authors are expected to use Tags (see Section 4.3.1) whenever possible to make it easier for others to search for and reuse questions.
- Authors should verify that the Program and Surveillance System associated with their account in SDP-V (see Section 3.4) is accurate when they are creating new content. This is to ensure that the association between SDP-V content and Programs and Surveillance Systems remains accurate. This association between content and the Program and System using it helps other users of the system to

better understand the context in which existing SDP-V content is used and make informed decisions to reuse content for their own data collection needs.

- Authors should include in a request for draft content to be published at least the following:
  - Whenever a Question is extended, describe why the original question did not meet the Author's needs. This context could be valuable to other users (e.g., reading level, culturally preferred term, etc.).
  - A need date for publishing the draft content.

### **2.3.3 PUBLISHER (AUTHENTICATED USER WITH PUBLISHER ROLE)**

SDP-V Publishers are identified by CDC Programs. Publishers are authenticated SDP-V users (i.e., Authors) who have been granted the Publisher role. In general, Publishers are individuals who have expertise with surveys, vocabularies, public health standards, and the program they support. They have expertise in content needed to perform surveillance for a condition or set of conditions. Publishers are responsible for SDP-V content for a single program, but should have a cross-program awareness of related content to encourage cross-program harmony.

SDP-V Authors who are interested in becoming Publishers should either contact the appropriate CDC program with this request or should contact the SDP program for further assistance (see section 6.0).

A summary of capabilities available to Publishers in SDP-V is as follows.

- Browse, search, and view details of all published content
- Create new content (considered draft content until published)
- Browse and edit their own draft content
- Create a copy and extend others' published content
- Browse and search all draft content
- Ability to publish content that is in a draft state, regardless of the author of that content

There are several expectations and best practices for Publishers to maximize the value of SDP-V.

- Ensure quality of questions and response sets, and ensure that Authors use pre-existing authoritative response sets (e.g., those synchronized from PHIN VADS) where possible
- Ensure harmony of content within the assigned program
- Encourage harmony across content for multiple programs
- Be responsive to Author publish requests
- Inform Author of disposition of publish request via email

## 2.4 OPERATIONAL STATUS

The current version of SDP-V is the first production release, representing a minimally viable set of features. Future releases will incorporate additional capability development based on feedback and feature requests from existing and future users.

## 3 GETTING STARTED

This section serves as a quick reference for basic access and account configuration actions.

### 3.1 ACCESSING SDP-V

The SDP-V service is accessible via a web browser by visiting the following URL:

<https://sdp-v.service.cdc.gov>

A user account is not required to browse, search, and view content in the service that has been marked as published. A user account is required to author content. Information on registering as a user is contained in Section 3.2. Information on accessing the content in the service via a Representational State Transfer (RESTful) API is provided in Section 4.8 of this document.

### 3.2 REGISTERING AS A USER

Authentication to the SDP-V service is provided via the CDC Secure Access Management Service (SAMS)<sup>3</sup>.

#### 3.2.1 VIEWER

If your only need is to view and search existing SDP-V content, you may simply follow the access instructions in Section 3.1 to get started.

#### 3.2.2 AUTHOR

In order to become an SDP-V Author, users should work with their program leadership to request the ability to author content. If you are uncertain who to contact, contact the SDP program (see Section 6.0) for assistance. Registering to become an SDP-V Author involves the prospective user accepting an invitation from SAMS, providing information to CDC, and review of this information by CDC. Please allow time for your request to be reviewed and approved.

#### 3.2.3 PUBLISHER

Because Publishers have the important duty of ensuring quality and encouraging harmonization, they are identified when a CDC program commits to using SDP-V to author questions and response sets needed to address their data collection needs. The SDP program calls this “program onboarding.” Therefore, SDP-V Publishers are normally designated by the associated CDC program during the program onboarding process. After this onboarding process, changes to Publishers can be made by sending an email request to the SDP program (see Section 6.0).

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<sup>3</sup> For more information about SAMS, please visit <https://auth.cdc.gov>



### 3.3 LOGGING IN

Once you access SDP-V via your browser at the web address given in Section 3.1, click the Login button at the top right of the screen. You will be redirected for authentication through the SAMS portal.



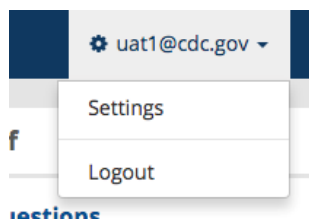
Upon authenticating via SAMS you will be redirected back to the SDP-V service and logged into the system, provided you have been given access to the service through SAMS.

### 3.4 SELECTING A PROGRAM AND SURVEILLANCE SYSTEM

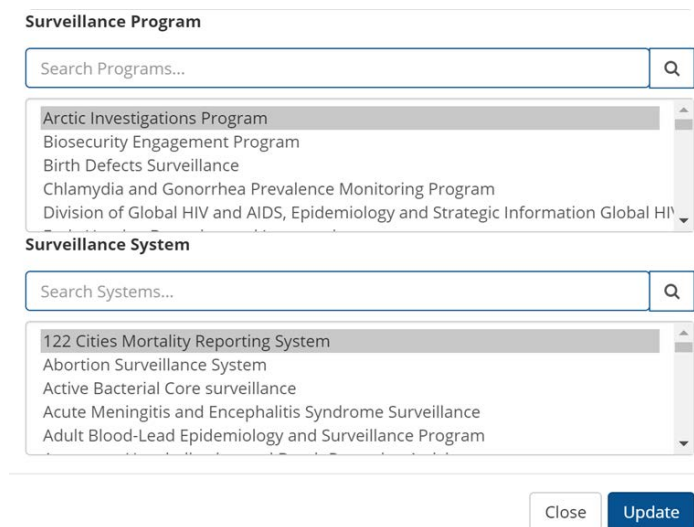
Users of SDP-V can select the program and surveillance system they support to associate it with their SDP-V account. This information will populate metadata in the system regarding which programs and surveillance systems are using particular content. A user may select and change the program and system selection at any time via the application's Settings menu.

To select your Program and Surveillance System:

1. Click on the drop-down menu with your account name in the top-right corner of the application.



2. Select Settings to bring up the account details dialog window.
3. Select the Program and Surveillance System you support by clicking on them in the list. You may search for Programs and Surveillance Systems by name by typing in search keywords in the "Search Programs..." or "Search Systems..." text boxes, respectively.

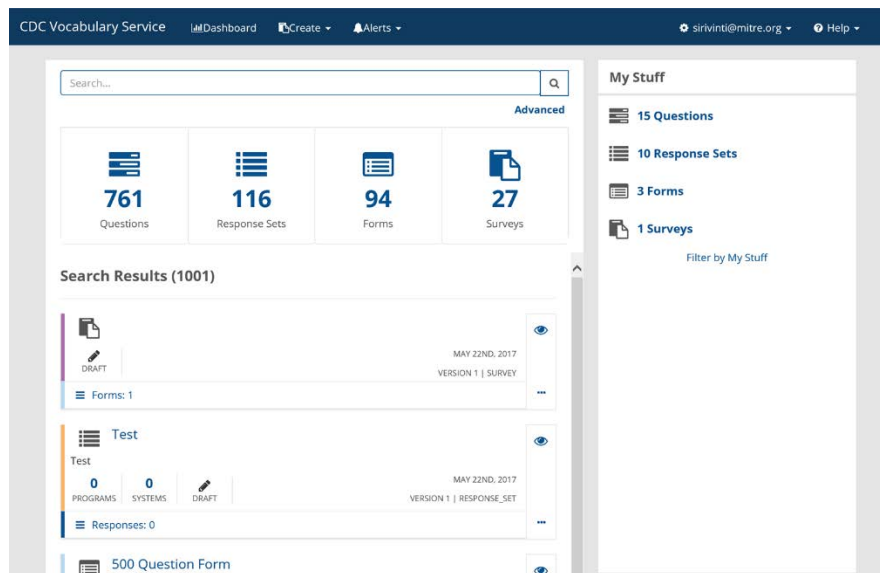


4. Click “Update” to confirm your selections.

If the System or Program you wish to select is not listed, contact the SDP program to request that the list be updated (see Section 6.0).

### 3.5 NAVIGATION OVERVIEW

When you first access the SDP-V application, you will see the SDP-V Dashboard screen, pictured below.



The Dashboard contains a search bar, several filter options, and presents search results. More information about search functionality in SDP-V can be found in Section 4.1.

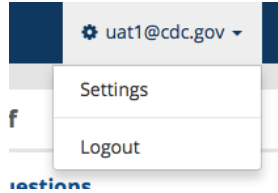
At the top of each SDP-V page is a navigation header. Depending on your user role (Viewer, Author, or Publisher), the options you see in the navigation header will differ. If you are an Author or Publisher, you will see (from left to right) an option to navigate back to the Dashboard, a drop-down menu to Create different types of content (see Section 4.3 for more detail), Alerts if others have commented on your content, a Settings menu (drop-down from your username), and a Help menu.

When navigating between pages in SDP-V, you may use the back button in your browser or the Back-arrow buttons within the application to go back to the previous page you viewed.

### 3.6 LOGGING OUT

To log out of the application:

1. Click on the drop-down menu with your account name in the top-right corner of the application.
2. From the drop-down menu, click the "Logout" option.



Logging out will return you to the SDP-V Dashboard.

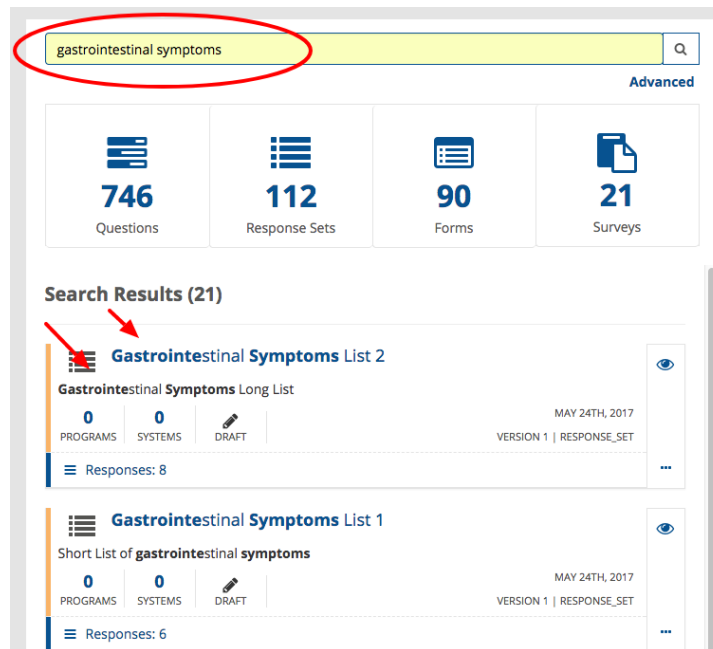
## 4 INSTRUCTIONS FOR SDP-V USE

The following subsections contain detailed step-by-step instructions along with screenshots to walk a user through how to use SDP-V capabilities.

### 4.1 SEARCHING FOR CONTENT

The SDP-V Dashboard is the first screen presented to a user when they access the application. You may access the dashboard at any time by clicking the "Dashboard" button in the header of the application, as described in more detail in Section 3.5.

From the SDP-V Dashboard, users have the ability to search for content by keywords or phrases.

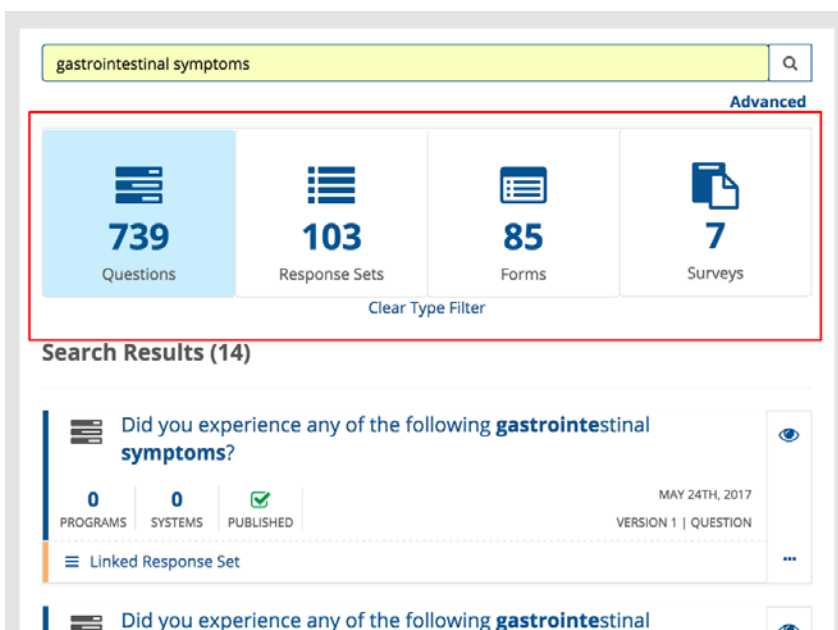


To search for content:

1. Add a keyword or phrase to the search input field (circled in red in the above screenshot).
2. Click on the search icon or hit the Enter key.
3. The list of Search Results below will be updated to reflect your search terms.
4. The results are prioritized by relevance. The search term is highlighted wherever it appears in search results (indicated by red arrows in the above screenshot).

#### 4.1.1 FILTERING BY TYPE OF CONTENT

If you would like to search for a particular type of content (e.g., just questions, response sets, SDP-V forms, or SDP-V surveys), SDP-V allows you to filter search results by content type. You may do so by selecting a content type in the analytics widget on the dashboard. The analytics widget (outlined in red in the below screenshot) appears below the search bar and lists counts of each type of content in the system.



To filter your search results by content type:

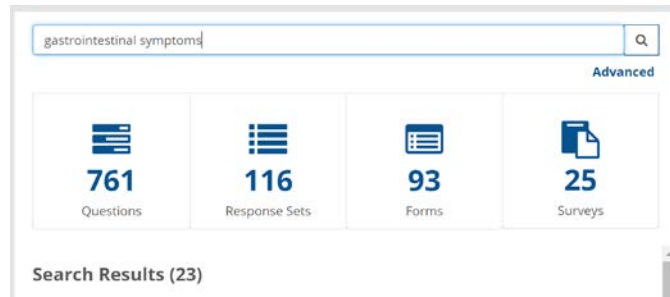
1. Select the desired type (e.g., Questions, Response Sets, Forms, or Surveys) from the analytics widget.
2. Your selection will become highlighted and the list of search results will be updated to reflect your selection.
3. Select “Clear Type Filter” to remove the content type filter and search across all types of content

#### 4.1.2 FILTERING BY PROGRAM, SURVEILLANCE SYSTEM, OR BOTH

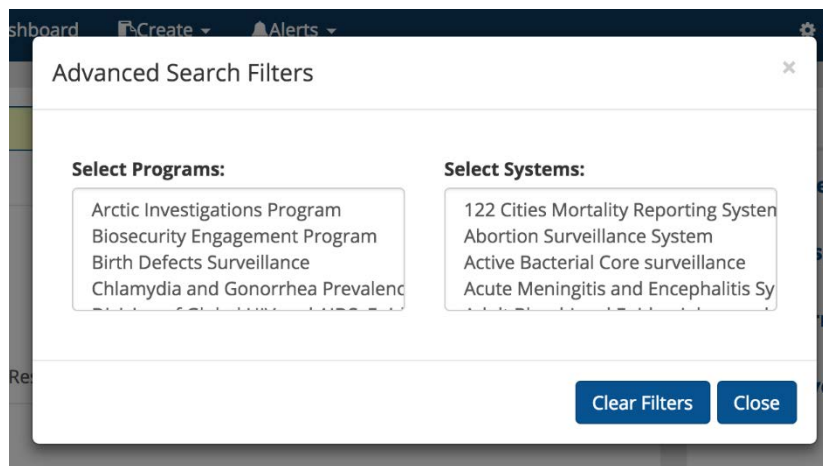
The Advanced Search feature allows users to find content associated with a specific program, surveillance system, or combination of the two.

To filter by program, system, or both:

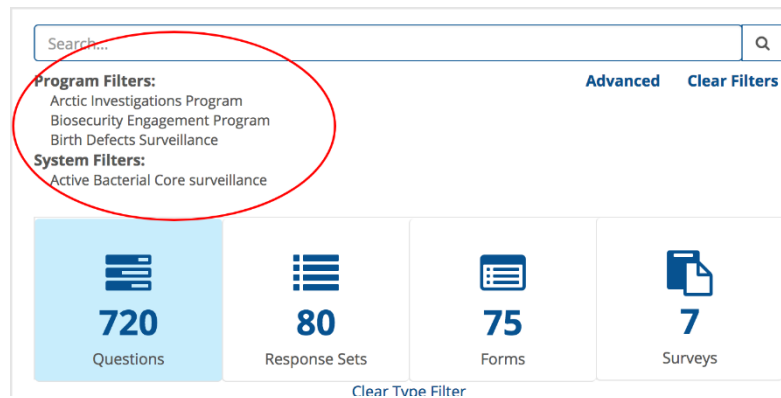
1. Click on “Advanced” under the search input field on the SDP-V Dashboard. This will bring up the Advanced Search Filters dialog window.



2. Select the desired Programs and Systems by clicking on them. If needed, you select multiple items within the list by holding down the “Shift” key before clicking.



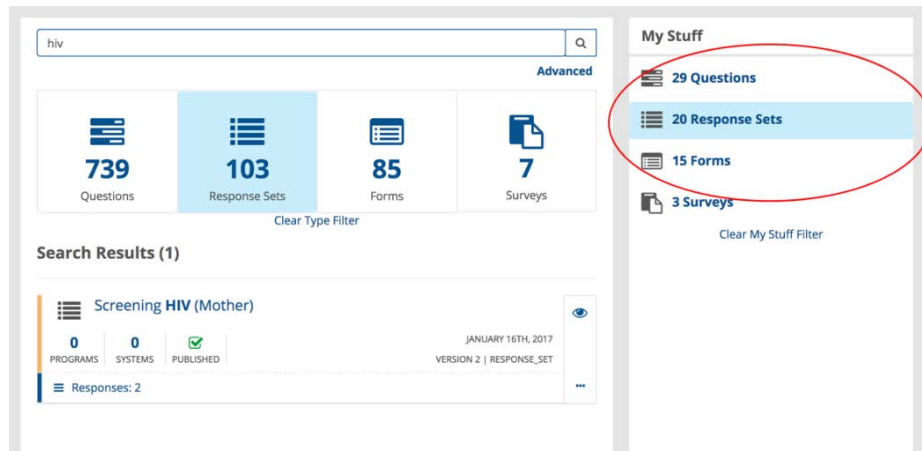
3. Click “Close” to dismiss the window and view an updated list of results. Your selections will appear in the search results list.



4. Select “Clear Filters” to remove the Program and System filter and view search results across all Programs and Systems.

#### 4.1.3 FILTERING TO “MY STUFF”

The user has the ability to focus search results on the content they have authored via the “My Stuff” panel on the right-hand side of the SDP-V Dashboard.



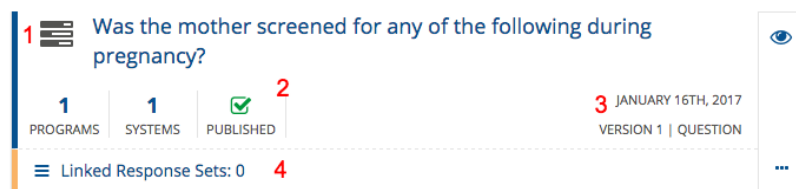
To filter by content you have authored:

1. Select a desired content type from the “My Stuff” panel on the right.
2. The analytics widget and results list will update with content that matches your selection.
3. Select “Clear My Stuff Filter” option in the “My Stuff” panel to remove your filter.

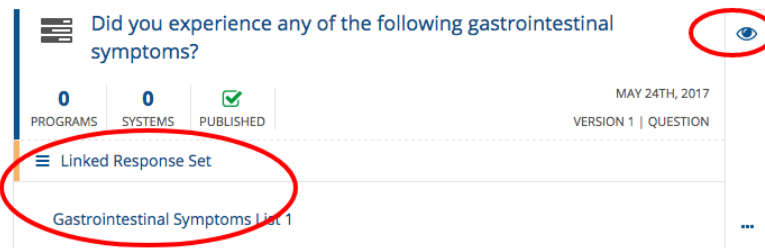
#### 4.2 VIEWING DETAILS OF EXISTING CONTENT

Each piece of content in SDP-V is represented in search results by a content widget (as shown in the below screenshot). Content widgets give the following information:

1. The content title.
2. Number of Programs and Systems associated, and the status (Draft or Published) of the content type.
3. The creation date, version number, and content type.
4. Linked or associated content (Questions may be linked to Response Sets, Forms may contain Questions, and Surveys may contain Forms).



From the content widget, there are two methods to view additional details about the content:



1. Clicking on the "Linked Item" bar at the bottom of the widget expands this section of the widget to display additional information about linked content.
2. Clicking the "eye" icon at the top right of the widget allows you to navigate to the details page for the content.

Navigating to a details page gives you a complete summary of the content, including version history, author and publisher (if applicable), description and contents, associated tags (for Questions), linked content, and program and surveillance system usage.

← Question Details

History Revise Extend

Version 1

**Name:** Did you experience any of the following gastrointestinal symptoms?

Version: 1 - Author: test\_author@gmail.com

**Details**

**Description:** Checking to see if the respondent had any GI issues.

**Created:** July 12th 2017, 3:55:51 pm

**Published By:** test\_author@gmail.com

**Question Type:** Clinical signs and symptoms

**Response Type:** Choice

**Other Allowed:** No

**Tags**

Information about associated Tags:

Display Name	Tag Code	Code System
Gastrointestinal symptom (finding)	267045008	SNOMED

**Linked Response Sets**

**Gastrointestinal Symptoms** 👁

Gi symptoms

1 1 ✔

PROGRAMS SYSTEMS PUBLISHED

JULY 12TH, 2017

VERSION 1 | RESPONSE\_SET

...

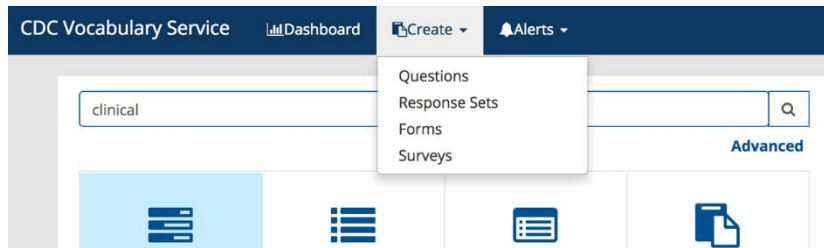
**Usage**

**Surveillance Programs:** 1 - Biosecurity Engagement Program

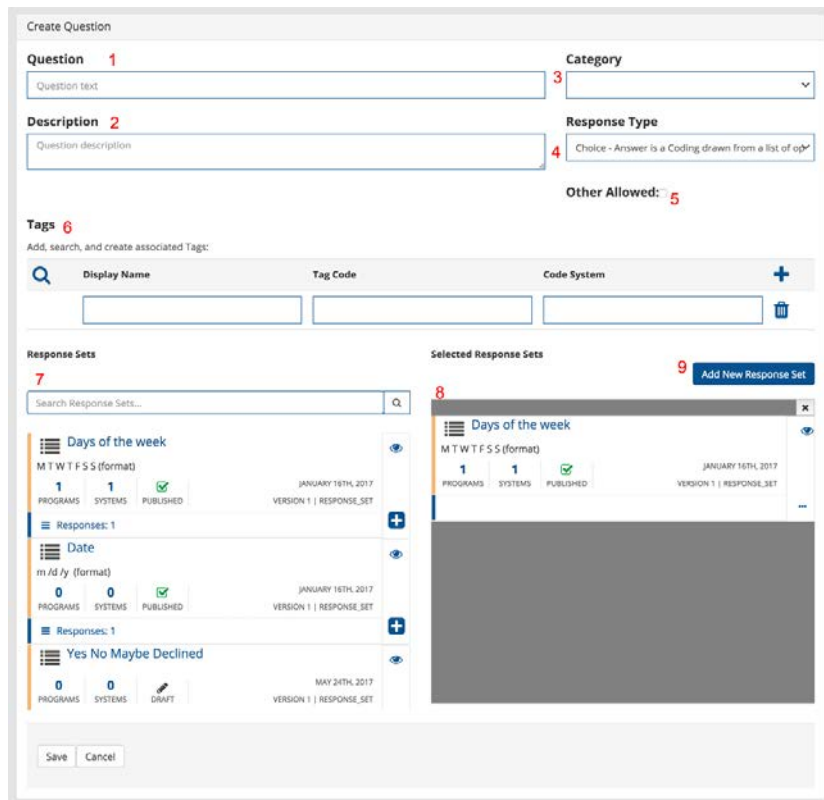
**Surveillance Systems:** 1 - Active Bacterial Core surveillance

### 4.3 DRAFTING NEW CONTENT

If you have Author or Publisher privileges in SDP-V, you will see a "Create" dropdown menu in the header at the top of the application. This dropdown menu will be your starting place for creating new Questions, Response Sets, Forms, or Surveys from scratch.



### 4.3.1 DRAFTING NEW QUESTIONS



To draft a new question:

1. Type in the question text. *(Example: What day were you sick?)*
2. Give the question a description, ensure you add terms that are specific to your question. This will help support search and filtering.
3. Select a Category, the category will define the type of question you are creating. The categories include: “Patient demographics”, “Clinical signs and symptoms”, “Past medical history/treatment”, “Clinical outcome”, “Laboratory information”, “Epidemiologic information”, “Epidemiologic exposure history (places visited, persons, household contacts, etc.)”.



4. Choose a Response Type. These values are drawn from the HL7 QuestionnaireItemType value set<sup>4</sup> that indicates what kind of response is expected for the question.
5. (Optional) Select Other Allowed. This choice appears when the “Choice” or “Open Choice” Response Type is selected. When checked, it indicates that the question provides an “other” choice where a respondent can provide their own answer outside of the chosen Response Set.
6. Add Tags to support search and filtering. Tags are keywords from a controlled vocabulary applied to a question to help facilitate finding relevant questions during a search. For instance, if you are authoring a question about multiple drug resistance *Escherichia coli*, tagging the question with the SNOMED-CT code for multiple antimicrobial drug resistant bacteria may help others who need to collect data about multiple drug resistant organisms in the future. See Section 4.3.2 for more detail about the Display Name, Code, and Code System fields, and information on how to search for coded values through SDP-V.
7. If you chose “Choice” or “Open Choice” as the Response Type in Step 4, this means that you expect responses to the question to come from a defined set of viable responses. You will be able to search through existing Response Sets in the system and associate them with the Question you are creating if they are applicable. To select a specific Response Set, you can drag and drop it to the right panel, or click the “Add” button (shown as a + sign).
8. The selected Response Sets panel displays your selections. You can add more than one Response Set. Adding a Response Set to a question simply means that the Response Set may be a valid set of choices for the question. Later, when creating an SDP-V Form, you will be able to choose a Response Set to use for that given Form. This allows authors to associate a broad set of Response Sets with a question, but select a context appropriate one on a given form.
9. If you would like to associate a brand new response set with the question, you may do so by clicking the “Add New Response Set” button. This will bring up the New Response Set dialog. Section 4.3.2 describes the fields available to you during response set creation.

All fields are optional.

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<sup>4</sup> The HL7 QuestionnaireItemType value set describes the type of data expected in response to questions. More details about this value set can be found at <https://www.hl7.org/fhir/valueset-item-type.html>

### 4.3.2 DRAFTING NEW RESPONSE SETS

Create Response Set

**Name** 1

**Description** 2

**Responses**

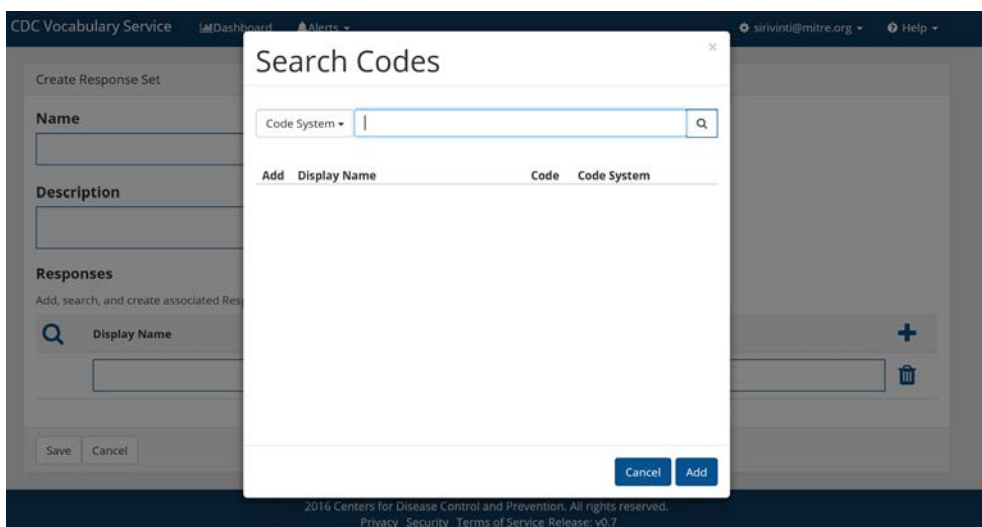
Add, search, and create associated Responses:

Q Display Name 3 Response Code 4 Code System 5 +

Save Cancel

To draft a new Response Set:

1. Give the Response Set a descriptive name (*Example: Gastrointestinal Symptoms*).
2. Give the Response Set a detailed description, ensuring you add terms that are specific to your response set. This will help support search and filtering.
3. Add a Display Name (*Example: Abdominal Pain, Vomiting, Diarrhea, etc.*). This is the human-readable value for the response.
4. If applicable, add a Response Code. This may come from your program’s internal coding scheme, or from an external code system such as LOINC or SNOMED-CT. Rather than requiring you to remember or copy and paste codes from other systems, SDP-V allows you to search for codes from such external code systems by clicking on the magnifying glass icon to the left of the Display Name field. This opens up the Search Codes dialog box, shown below. You may select a particular code system from the drop down menu, or enter a search term to search across multiple code systems. This code search functionality searches codes from PHIN VADS. You may add coded values from these search results to your response set by clicking the “Add” selection beside each result.



5. If you are using a coded value, specify the Code System used (*Example: the name of your program’s coding scheme, LOINC, SNOMED-CT, RxNorm, etc.*). Note that if you used the code lookup capability described in Step 4 above to add responses to your response set, SDP-V will automatically fill out the code system corresponding to each response added in this way.

Clicking the “plus” icon allows you to add multiple rows to the table. Note that SDP-V allows you to mix responses from multiple code systems along with non-coded responses within a single response set.

All fields are optional.

### 4.3.3 DRAFTING NEW FORMS

Recall that an SDP-V Form is a grouping of questions related to a topic (e.g., demographic, clinical, laboratory, epidemiological) and intended to appear together as part of a data collection instrument.

To draft a new Form.

1. Give the Form a name that reflects the type of content you are categorizing. (Example: Meningococcal Disease Vaccination Information)
2. Add a description to the Form. Ensure you add terms that are specific to your Form. This will help support search and filtering.
3. If the form has Office of Management and Budget (OMB) Approval, add the OMB Control Number
4. The Questions panel might include pre-existing questions. To select click the "Add" button (shown as a "+" sign).
5. As you are building your Form, you can associate Response Sets with the selected questions. Select from the Response Set drop down to see available Response Sets or Search a list of pre-existing Response Sets. As mentioned in 4.3.1, the Response

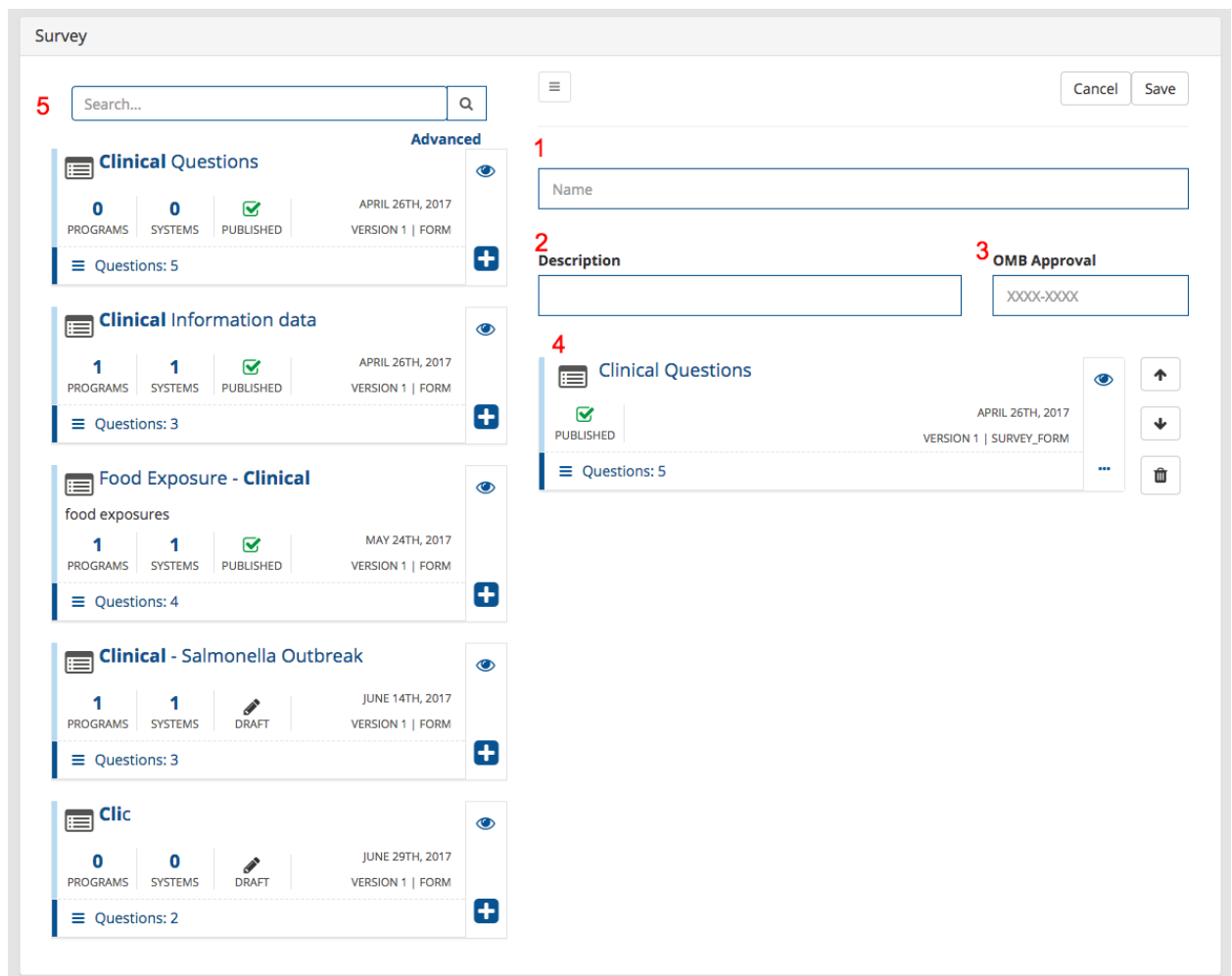
Sets provided in the drop down are those that the question author associated with the question.

6. Clicking the “Add New Response Set”, allows you to draft a new Response Set and associate it with a desired Question.
7. To organize the selected Questions, use the Up and Down arrows.
8. Type in a search term or phrase to find relevant Questions.
9. Click on “Add New Question” to launch the draft new question dialog.

All fields are optional.

#### 4.3.4 DRAFTING NEW SURVEYS

Recall that an SDP-V Survey is one or more SDP-V Forms with questions that are combined together and intended for a data collection instrument or information exchange.



To draft a new Survey.

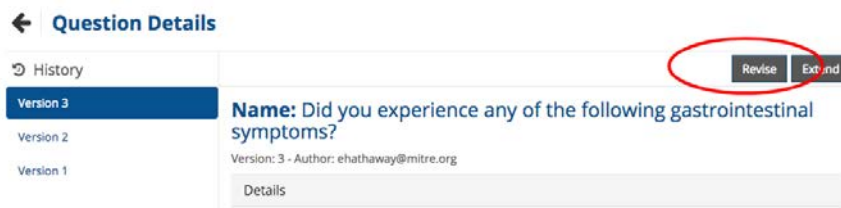
1. Give the Survey a name, the naming convention should reflect the type of Survey you are creating. (Example: Perinatal HIV Exposure Survey)
2. Add a description to the Survey. Ensure you add terms that are specific to your Survey. This will help support search and filtering.

3. If the Survey has OMB Approval, add the OMB Control Number
4. The Forms panel might include pre-existing Forms. To add more Forms click the “Add” button (shown as a “+”) in the Forms within the panel.
5. Type in a search term or phase to find relevant Forms.

All fields are optional.

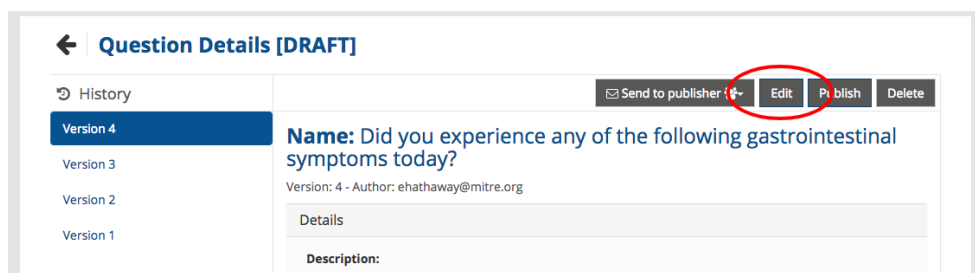
#### 4.4 REVISING AND EDITING EXISTING CONTENT

Users may edit their own draft content or revise their own published content. Editing draft content allows you to make any changes to it as needed before it is published. Revising published content creates a new version of that content in draft form, maintaining the history of the previous published version.



To revise Published content:

1. Find the content you wish to edit.
2. Navigate to the content details view.
3. Select the latest version of the content from the version history at the left-hand side of the details view page.
4. Click the “Revise” button. This will bring you to the authoring page for the content, with fields prepopulated based on what was previously filled in for the content. You may edit the content for each field as needed.
5. Click “Save” to confirm your changes.
6. Saving your changes creates a new version of the content in a draft state.



To edit Draft content:

1. Find the content you wish to edit.
2. Navigate to the content details view.
3. Select the latest version of the content from the version history panel at the left-hand side of the details view page.
4. Click the “Edit” button. This will bring you to the authoring page for the content, with fields prepopulated based on what was previously filled in for the content.

5. Click “Save” to confirm your changes.
6. Making edits to draft content does not change the version history for that content.

#### 4.5 EXTENDING EXISTING CONTENT

Users may extend published content, meaning that they may create a draft copy of that content to use as a starting point for their own content. Unlike revising and editing, you do not need to be the author of a piece of content to extend it.



To extend existing content:

1. Find the published content you wish to extend.
2. Navigate to the content details page.
3. Click the “Extend” button. This will bring you to the authoring page for the content, with fields prepopulated based on what was previously filled in for the content. You may update content in any field as necessary.
4. Click “Save” to confirm your changes.
5. Saving an extension will save a draft that is the first version (new revision history) with a link to the content it was extended from.

When you eventually request that a publisher review your content (see Section 4.9), you will be asked to share why you chose to extend rather than reuse existing content.

#### 4.6 COMMENTING ON EXISTING CONTENT

Users may post comments on existing content in the system, as well as reply to others’ comments.

##### Public Comments:

Your Comment

Post

5 months ago by Ammu Irvinti

I am curious about the data you are getting back in response to this question. Have you used it for your data collection?

reply

To post a public comment to a content type:

1. Navigate to the details view page for the content you would like to comment on.
2. Scroll to the bottom of the page.
3. In the “Your Comment” field, type the comment you would like to make.

4. Click the “Post” button, to display your comment along with a timestamp. Your comment will be visible to other users of the system. The author of the content will be notified of your comment when they next access SDP-V.

#### 4.7 EXPORTING EXISTING CONTENT

SDP-V users can export Forms they can access in one of two ways: 1) Export to PDF and 2) Export to an XML format used by Research Electronic Data Capture (REDCap)<sup>5</sup>. Viewers (unauthenticated users) can only print published content to PDF.

##### 4.7.1 EXPORT TO PDF

You can export Forms to PDF in SDP-V via print to PDF.

To print content to PDF:

1. Navigate to the details view page for the content you would like to save as PDF.
2. Click the “Print” button at the top right of the details view page.

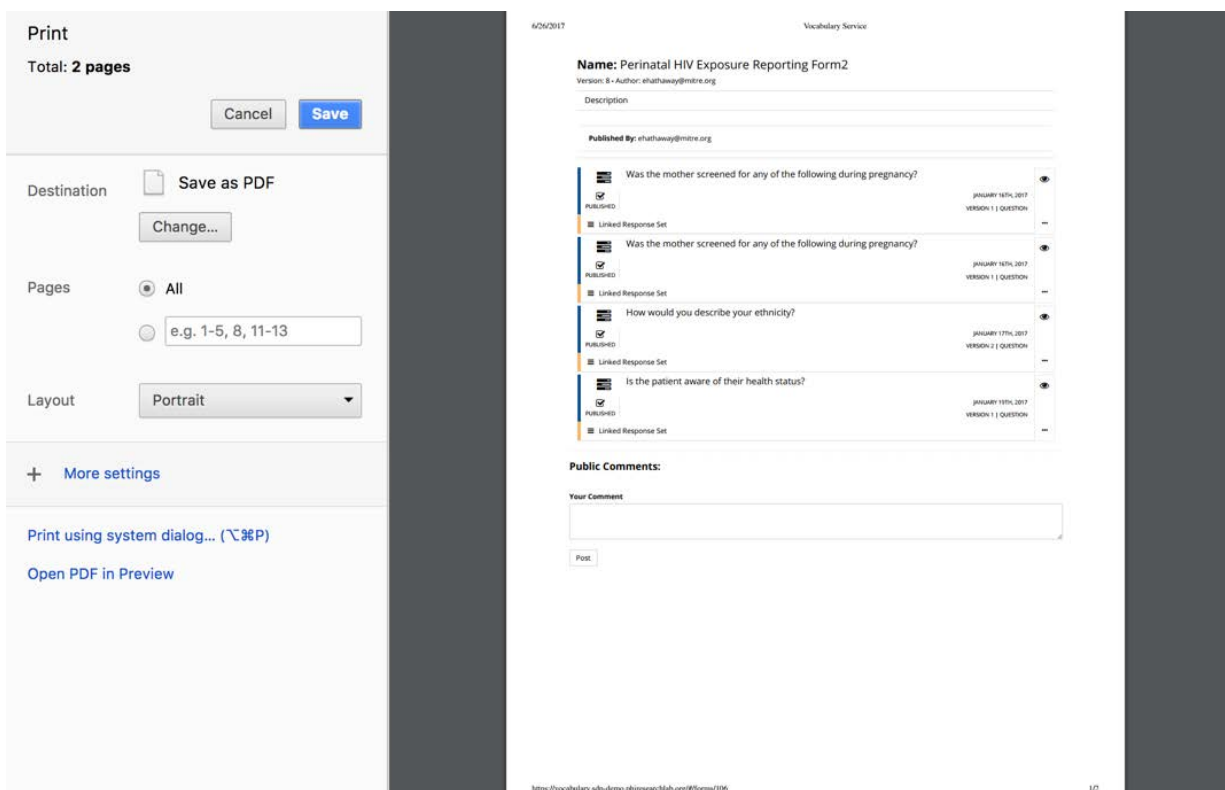


Your browser will open up a Print dialog window, showing a preview of what the PDF will look like.

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<sup>5</sup> REDCap is an application used for building and managing surveys and databases. For more information, please visit <https://projectredcap.org/>





3. Click the “Save” button in the print dialog window.

#### 4.7.2 EXPORT TO REDCAP

To export an SDP-V Form to REDCap, you must have access to REDCap. The wording of certain steps below may vary slightly depending on the version of REDCap you are using.

1. Navigate to the details view page for the form you wish to export.
2. Click on the “Export to Redcap” button on the Vocabulary service form details page (this will save a .xml file to the folder where your browser directs downloads)
3. Open REDCap.
4. Choose the option to create a new project.
5. On the project creation page, follow the on-screen instructions to add a name and various attributes to the new project.
6. Look for an option titled "Start project from scratch or begin with a template?" (or similar), and choose the "Upload a REDCap project XML file" option.
7. Click the "Choose File" button to select the .xml file you downloaded from SDP-V. It will be in the folder where your browser downloads content into (usually the “Downloads” folder).
8. After selecting the .xml file to import and filling out the rest of the fields, click on the “Create Project” or “Start Project” button at the bottom of the page.

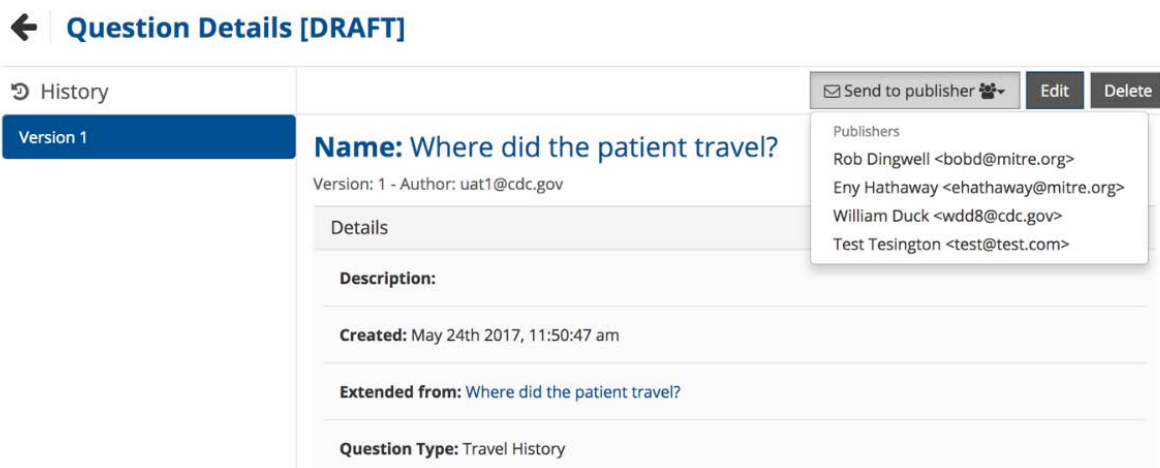
#### 4.8 ACCESSING CONTENT VIA THE SDP-V APPLICATION PROGRAMMING INTERFACE (API)

The SDP-V API is documented in using the Swagger format. This format allows SDP-V to generate a documentation web site which can be found at <https://sdp->

[v.services.cdc.gov/api/index.html](http://v.services.cdc.gov/api/index.html). This web site provides developers with the information they need to build applications that access information in SDP-V. Additionally, the Swagger document provided on the site can be used by software development tools to generate source code to access the service. To see a list of environments supported by the Swagger code generation environment, visit: <https://swagger.io/swagger-codegen/>.

#### 4.9 REQUESTING THAT CONTENT BE PUBLISHED

SDP-V Authors may not publish their own content; rather, they must reach out to a Publisher to request that their draft content be published.



To submit your content for publishing:

1. Find the draft content you wish to publish.
2. Navigate to the details view page.
3. Click the “Send to Publisher” action button at the top right of the details view page.
4. Select the Publisher that supports your program from the list. Authors are expected to know which Publisher supports their program.
5. Selecting a publisher will bring up a prepopulated email message within the email client configured in your system (typically Outlook). Include in this email message a justification for why it was necessary for you to create new content rather than reuse existing content, and a need-by date for publishing.
6. Click “Send” in the email message to notify the Publisher that your content is ready for review.

## 5 PUBLISHER FUNCTIONS

Publishers are responsible for reviewing content created by SDP-V Authors on the program they support, and making determinations of whether such content is ready to be published.

### 5.1 FIND OTHERS’ DRAFT CONTENT

As an SDP-V Publisher, you will be able to view all draft content in the system, regardless of who authored it. When an Author is ready for their content to be reviewed, they will

notify you via an email. This email will contain a link to the specific content for your review, as well as a justification for why new content was needed (rather than reuse) and a need-by date for your review.

Clicking on the link in the email message will take you to details view page of the draft content for your review.

Once you have completed your review, notify the Author of the outcome of their request via email.

## 5.2 PUBLISH DRAFT CONTENT

Once you have reviewed draft content and determined that it is ready to be published, you can do so by clicking on the “Publish” action button at the top right of the details view page for that content.



Note that publishing a piece of content will also publish any lower-level pieces of content associated. For example, publishing a Form will also publish and Questions and Response Sets on that Form.

## 6 CONTACT US

You may contact the SDP team via email at [surveillanceplatform@cdc.gov](mailto:surveillanceplatform@cdc.gov), or via the “Contact Us” page at <https://www.cdc.gov/sdp>.

## Appendix A: Acronyms

Acronym	Definition
API	application programming interface
CDC	Centers for Disease Control and Prevention
GUI	graphical user interface
MMG	message mapping guide
OMB	Office of Management and Budget
PHIN VADS	Public Health Information Network Vocabulary Access and Distribution System
REDCap	Research Electronic Data Capture
RESTFul	Representational State Transfer
SAMS	Secure Access Management Service
SDP	Surveillance Data Platform
SDP-V	Vocabulary Service
STLT	state, tribal, local, and territorial