

## CDOL Tip of the Week. November 21, 2011

### CDOL Searching Smart: Using the Status drop-down in Advanced Search

A recent feedback item inquired about how to locate units or leaders who recently became active. With the use of the “Status” drop-down, combined with one or two other search criteria, a search can be designed that will display either new organizations or newly called leaders.

1. Go to Advanced Search
2. Select the Search Type (either the default “Organization Type” or, if searching for newly-appointed leader(s), select “Position Type.”)
3. \*Optional\* If searching for specific organization type(s) [or position type(s)], from the Organization (or Position) Type drop-down select “Select Organization [or Position] Type(s)” and in the pick list that appears, place a check to the left of each organization type (or position type) to be searched (Note: choosing to skip this step will likely return a larger number of results unless the search is limited elsewhere)
4. Go to the “Organization (or Position) Status” drop-down. The default setting for this field is “Is Currently Active.” Opening the drop-down displays two global settings and three definable sections.  
**(Note:** Although users can see the entire range of settings in this drop-down, a user’s view rights determines which organizations and respective status levels will be seen when performing a search (e.g., a user with rights to see only certain active units would not be able to see pending or historical [discontinued] units regardless of how the status level was changed)
  - a. The first listed option, “Any Status,” will display any organizations or positions of the type(s) selected, regardless of status, so long as the user has rights to view the status level.
  - b. Last Published allows users to search the system for recently published (or verified) units or positions, but this option would not necessarily reflect recently activated organizations or leaders
  - c. The first section allows users to search based on what current status is: pending, active, or historical (or for positions: pending, active, non-functioning [a status specifically for patriarchs], or released)
  - d. The second section “As Of” allows users to search for any organizations or leaders whose status was a specific type as of a specific date (for example, if a user wanted to know how many wards were active on January 1, 2010, this option could be used)
  - e. The third section “Changed To” allows users to specify a time frame for when a particular position or organization type was changed to the specified status type.
    - i. For this example, this would be the option a user would choose. Select from the third section “Active.”
    - ii. When the above selection is made a “Date” option appears below the drop-down field that can be used to define a specific date or a range of dates by choosing or entering variables in the visible fields. (Note: If the user is creating a search to be saved and reused over and over, using a date range [e.g., “within the last 30 days,” etc.] rather than a specific date or date range [e.g. “between October 21, 2011 and November 21, 2011,” etc.] will allow the search to be rerun without resetting the

date parameters each time the search is executed to obtain the same time period from the current date)

5. **\*Optional\*** The user may further refine the search parameters, such as choosing a Church or Political location in which to search, typing a key word in the “Key Word(s)” field, or specifying other options, which will be further discussed in future tips.
6. Once the criteria have been set, click “Search.”
  - a. If the returned results list is too large, too small, or not what the user is expecting, the search can be modified by clicking on the “Refine Search” link in the shaded bar above the list of results.
  - b. If the search results list is correct, the user can choose to save the search by clicking on “Save Search As” in the shaded bar above the list of results. The saved search will then appear under “My Searches” on the CDOL home page.