

CDOL Tip of the Week. November 7, 2011

CDOL Searching Smart: Using default preferences or Advanced Search

A recent feedback item came to us that suggested this tip. Here is the item:

When looking for a Bishop and only the last name is known, i.e., Jackson, and the program has too many Jacksons and wants to refine, I cannot determine which Jackson [is correct] as I am not able to determine the residing City and or state. The Ward may be apparent, but not where the Ward is located. It would be helpful to find a Bishop if we could put in his name (only last name is known), City and State.

There are two options for the user, as suggested by the message above.

To include the city in the results list:

1. Click on the "My Account" link found at the top of the page (to the right of the user name), which opens the personal preferences page
2. In the right hand column of that page, under the section "Search Default Settings" mark the second radio button called "Search in the organization's primary location address (see the organization summary - address section: primary location)"
3. Click "Save" (lower left corner)

Now when running a search the city is visible on the results page under the location column (that is if the organization has the primary location address city field populated).

NOTE: CDOL has two options for what displays on the results list under organization location as described above (instance override of the set default is in Advanced Search under "Political Location):

- Primary Location, which is required by the system to be populated with at least country and often with state/province when the organization is created (CDOL default setting and always populated)
- Primary Location Address, which is the physical address of the organization, but is not required (can be set to default and, though usually populated for most organizations, could appear as empty)

To perform the search so the user can "put in [leader's] name (only last name is known), City and State":

1. Click the "Advanced Search" (the link below the search field)
2. Type the last name (or as much of the name that is known) of the [leader] in the "Keyword(s)" field
3. Select "Position" as the search type
4. To the right of "Position Type" select "Select Position Type(s)" from the dropdown
5. When the positions pick list appears, check the box to the left of "Bishop" (or other leader type)
6. Navigate down to "Where are you looking?" and under the Political Location section open the "Refine Political Locations" dropdown
7. Select the country, such as "United States" (press the letter "U" on the keyboard five times for getting there fast) and then check the box by the correct state(s) from the pick list that appears
8. Then in the Property Address field type the City name (or as much of the name as is known)
9. Then click "Search"

If the names of the leader and the city are spelled correctly, and "city" is populated, results should appear