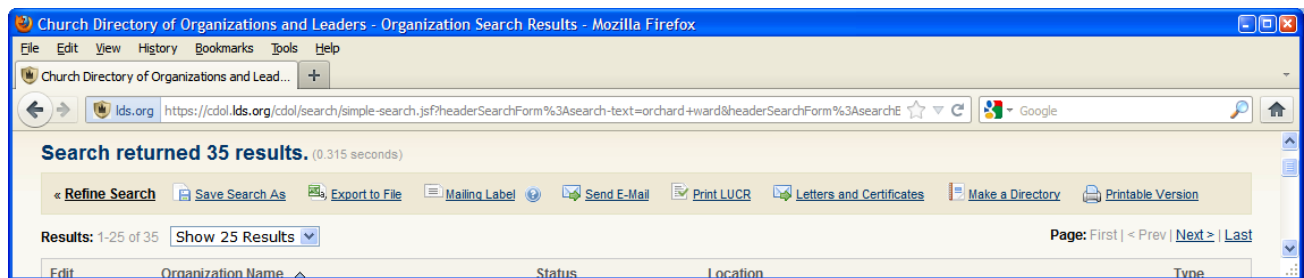


CDOL Tip of the Week. February 13, 2012

CDOL Feature: The Power of Refine Search

In working with users I have found that many have not realized just how powerful the “Refine Search” feature is for not only modifying searches when first being designed, but for retooling or repurposing existing saved searches, especially more complex ones that took a little thought to originally create.

The “Refine Search” feature is found at the far left of the shaded bar on the search results page of any search that produces two or more search results.



With a little planning, a user can create a single search that can then be changed to produce multiple custom searches of a similar type without having to start over each time. For example: If a user wanted to see all of the YSA stakes, wards, and branches assigned to each temple in Utah, with each temple listed in a separate report, a search could be designed for one temple, as follows:

1. In advanced search, select “Select Organization Type(s)” from the Organization drop-down
2. From the pick list that appears, select “Branch,” “Stake,” and “Ward” by putting a check in the box to the left of each (the user can more quickly find each organization type in the list by typing each word respectively in the empty field at the top of the list, checking the box, clearing the box and repeating the process)
3. Under “Classification” open the drop-down and select “Has Classification”
4. From the pick list that appears find and select “YSA” as the classification type
5. Under “Where are you looking?” open the drop-down and select Temple District
6. For viewing the units in a hierarchical order, with stakes listed alphabetically and reporting branches and wards listed alphabetically below each respective stake, check the box “Sort by Hierarchy” (See the Tip of the Week “Sorting by Hierarchy” for more information)
7. From the pick list that appears select the first Utah Temple in the list (the user can jump to that part of the list by typing “utah” in the empty field at the top of the list) by putting a check mark in the box to the left
8. Run the search
9. When the results appear, click “Save Search As” and name the search something representative, such as “[Temple Name] Temple Stakes, Wards, and Branches”
10. To create the list for the next temple click “Refine Search” and navigate down to the list of temples, select the next temple on the list and then remove the previous temple by clicking on the “X” in the circle to the right of the temple to be removed

11. Run the search again, since all of the other search criteria settings were preserved by using “Refine Search”
12. From the Search Results, again click “Save Search As” and use the same naming convention used in the first search to name the second search

Important Note: When rerunning a saved search and if creating multiple searches, such as this example where several searches will be created and each one named after a different Utah Temple, be sure to click the link ending with the word “As” since otherwise the search that was just run will be overwritten, rather than creating a new search (similar to the difference between “Save” and “Save as” in most applications). If the user wants to overwrite the existing saved search, the link called “Save Search” can be used

13. Continue the process until all Utah Temples have been completed.

If the task needs to be interrupted, it is easy to pick up where it was left by navigating to the CDOL home page and finding the last saved search under “My Searches,” clicking it (which runs the search), and then clicking on the “Refine Search” link on the results pages to continue the process.

In conclusion, this simple feature can save a lot of time, especially if several criteria are being used to design multiple searches, even if several of the criteria have to be changed on each search. Because “Refine Search” preserves all of the settings of the saved (or just run search if the search has not yet been saved), the user can track which criteria were changed or need to be changed in the search to provide the desired results. The more proficient the user becomes with the advanced search tool and the “Refine Search” feature, the easier it is to quickly scan down the design page and spot the sections where changes have been or need to be made.