CDOL Tip of the Week. June 11, Advanced Search Custom Location Selection
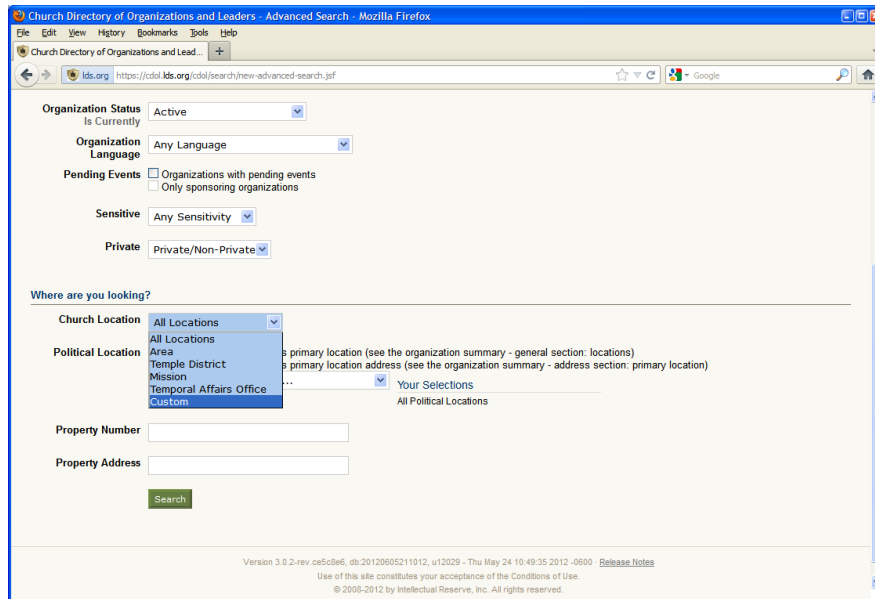
Advanced Search allows the user to refine where or under what type of organization to search. The last option under the Church Location drop-down is "Custom." When a search does not easily fit in one of the predefined Church Locations, "Custom" is a possible option that may allow more latitude in obtaining results because the user can select from other organization types
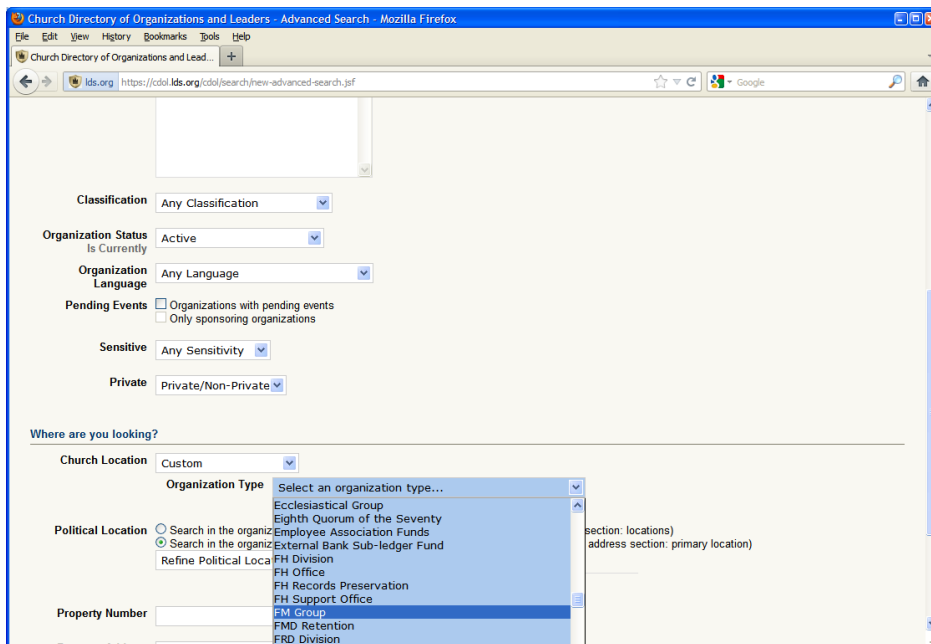
Making the Custom Selection

When this option is selected the user is allowed to choose from the entire list of organization types available in CDOL, and also select from certain. However, there are several things which need to be considered when selecting the Custom organization type:

1. Does the Organization Type (or the Position Type within an organization type) being searched for have an active association to the organization type selected under "Custom" that is actually visible in CDOL under associated organizations on the organization summary page?
    a. For example, if you are searching for "stake" and you chose "Temporal Affairs Office" from the Church Location drop-down, there will be zero results because stakes do not have a direct parent/child association listed in CDOL with the temporal affairs office. Likewise, if searching for "stake" and you chose Sixth Quorum of Seventy from custom, there would be zero results because there are no active associations visible in CDOL between the Quorum and stakes, although the members of the Sixth Quorum do interact with certain stakes in various ways
    b. If the organization type itself does not have an active visible association, does the organization type's parent or grandparent have an association?
        i. Going back to the first example above in point "a," if you chose "Temporal Affairs Office" from the "Custom" list, CDOL allows users to select another relationship or association type, other than parent, that the custom organization has with the organization type "Stake" or in

this case with the Stake's parent (the Area office). This example will be discussed a little more below in the section called "Defining the Custom Selection" in point 1b
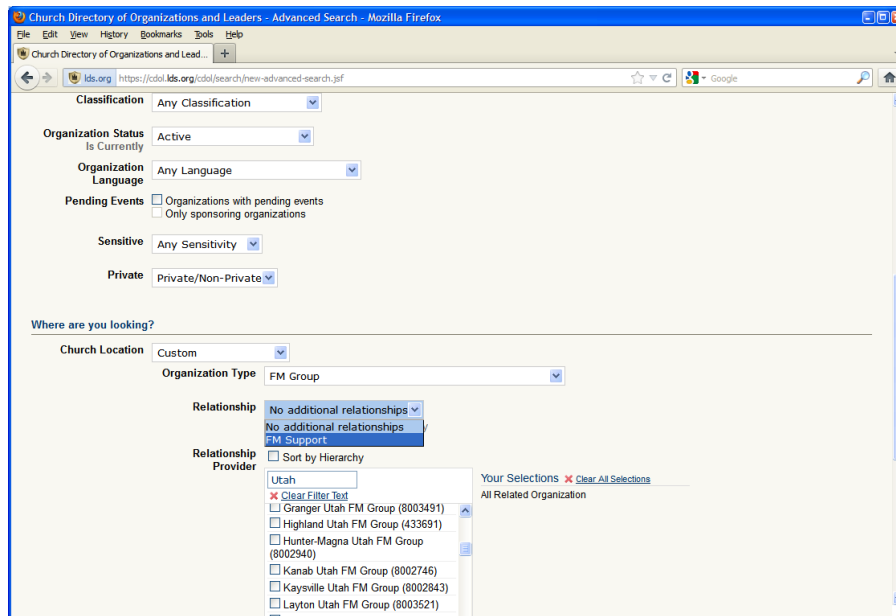
ii. If you were searching for "Ward" and "Branch" under the custom organization type "Area" the results should show all wards and branches, even though a ward, and in most cases a branch, does not have a visible association with the area, but because the parent or grandparent of each ward (stake) and branch (stake, district, or mission) has an association with the area, the search returns results

2. Does the custom organization hold a superior or provider association to the organization type(s) being sought?

   a. For a superior position example, if you are searching for the organization type "stake" and you tried to use "Ward" as the custom organization type, there will be zero results because there are no stakes under a ward, only wards under a stake

   b. For a provider example, if you are searching for the organization type "FM group" and you try to use "stake" as the custom organization type, there will be zero results because FM Groups provide support to stakes, but stakes do not typically provide support to FM groups

3. Do you as a user have rights to view the chosen organization type or custom organization type? If not, the results will be zero because CDOL will not allow any user to see organization types for which they do not have access. For example, some organization types are marked as "private" and therefore can only be viewed by those with rights to view the particular private organization(s). Likewise, some specific organizations are marked as private even though the organization type itself might be public. Again, unless the right to view the private organizations of that type has been granted, those marked private will not be available either in the search set up or in the subsequent results

Defining the Custom Selection

Once the custom organization type has been selected from the pick list (for this example we will use stake as the organization type and FM Group as the custom organization type), a drop-down, a check box, and another pick list will appear.

1. The drop-down requires the user to specify the correct association type the custom organization has with the organization type(s) being sought.
    a. If the association type is not the same for all organization types in the search then the organizations that don't have the specified association will be omitted from the results
    b. The correct association type must be selected for the organization being searched. Previously the example was presented for searching for "stake" under "Temporal Affairs Office." The stake's parent, the Area, has an association with the Temporal Affairs Office called "Temporal Affairs Support." Selecting this relationship, or association, allows a search to return results with these selections
    c. When a parent/child association is needed, the default "No additional relationships" can be used
2. The check box allows users to enable CDOL to display the results by hierarchy, if a hierarchy exists for the organization type(s) in the search. For example if "stake" and "ward" were the searched for organizations, the hierarchy would be displayed with the wards under the respective parent stake
3. The pick list will display all of the organizations of the custom type specified, of which any or all can be selected. The user can type a word, such as "Utah" in the field at the top of the list to display all of the choices together in the pick list that match the entry, which makes it easier to locate those organizations to be used in the search

Once the custom organization type has been defined and selected, if no other refinements are needed then the search is ready to be run