CDOL Tip of the Week. April 2, 2012

CDOL Feature: Using "My Account"

This tip explains how a user can customize at least some preferences in CDOL and save which sections appear on the home page and which sections are expanded when navigating to an organization summary page. This is accomplished by using the link "My Account," found in the blue field to the right of the displayed user name, at the top of the application window. Clicking on "My Account" takes the user to a page similar to below:
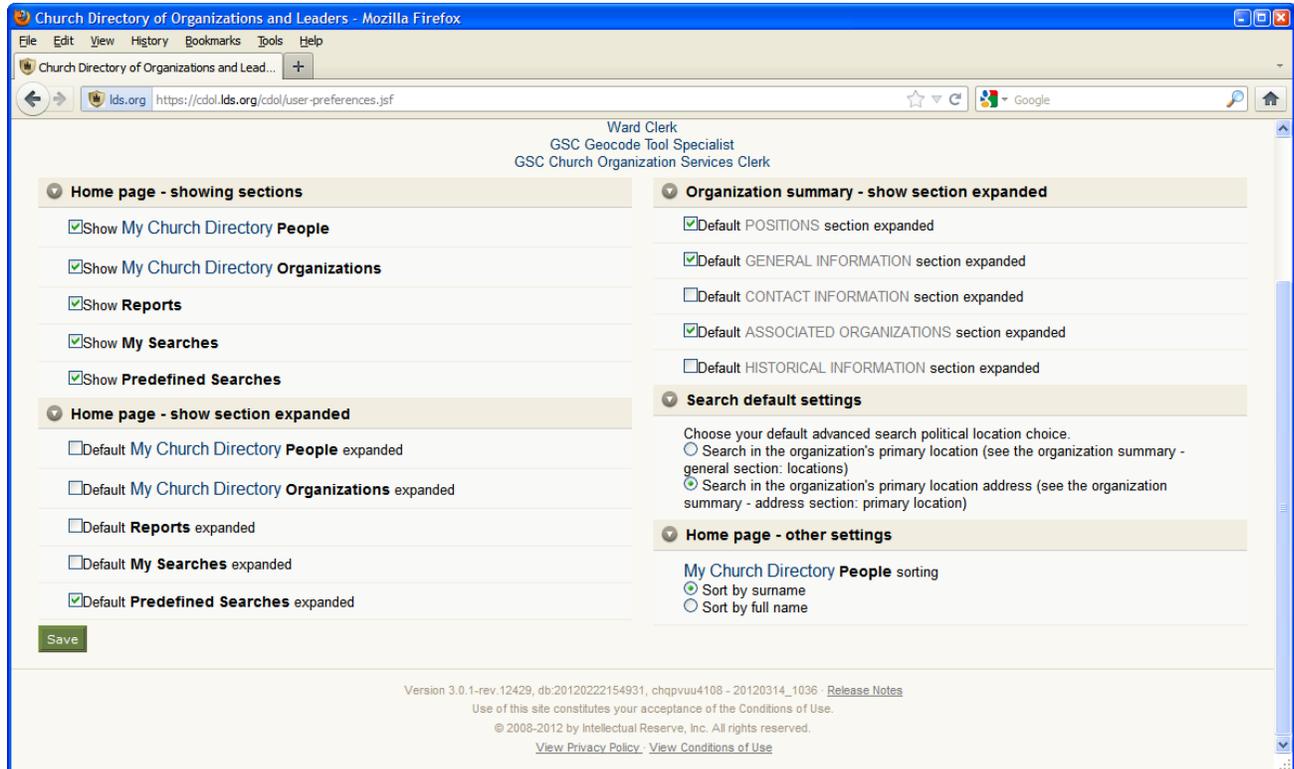
In the first column the user can use the check boxes in the two sections to enable what is displayed on the CDOL home page and what is expanded. The five options for display are:

1. People (this is where the user may save links that jump directly to an individual's summary page)
2. Organizations (this is where the user may save links that jump directly to an organization's summary page)
3. Reports (this displays the quantities of specific ecclesiastical organization types and shows a few different distributions of those organization types throughout the world)
4. My Searches (this is where the user's saved searches will appear)
5. Predefined Searches (this section is turned off by default, but enabling it allows users to see and use searches for specific organization types the program designers felt might be useful)

Enabling any of these sections with a check mark will cause the section to appear in its designated place on the home page, while removing the check mark will remove the section from view.

In the second section the user can choose which of the above items will appear on the home page already expanded. Expanding a section through these settings allows the user to avoid the need for an additional click to expand a section each time if a particular section is often used.

The second column has three sections which can be used to further refine how CDOL displays information.

1. The first section indicates which sections of an organization summary page are already expanded. If all sections are collapsed, the summary page would appear similar to below:
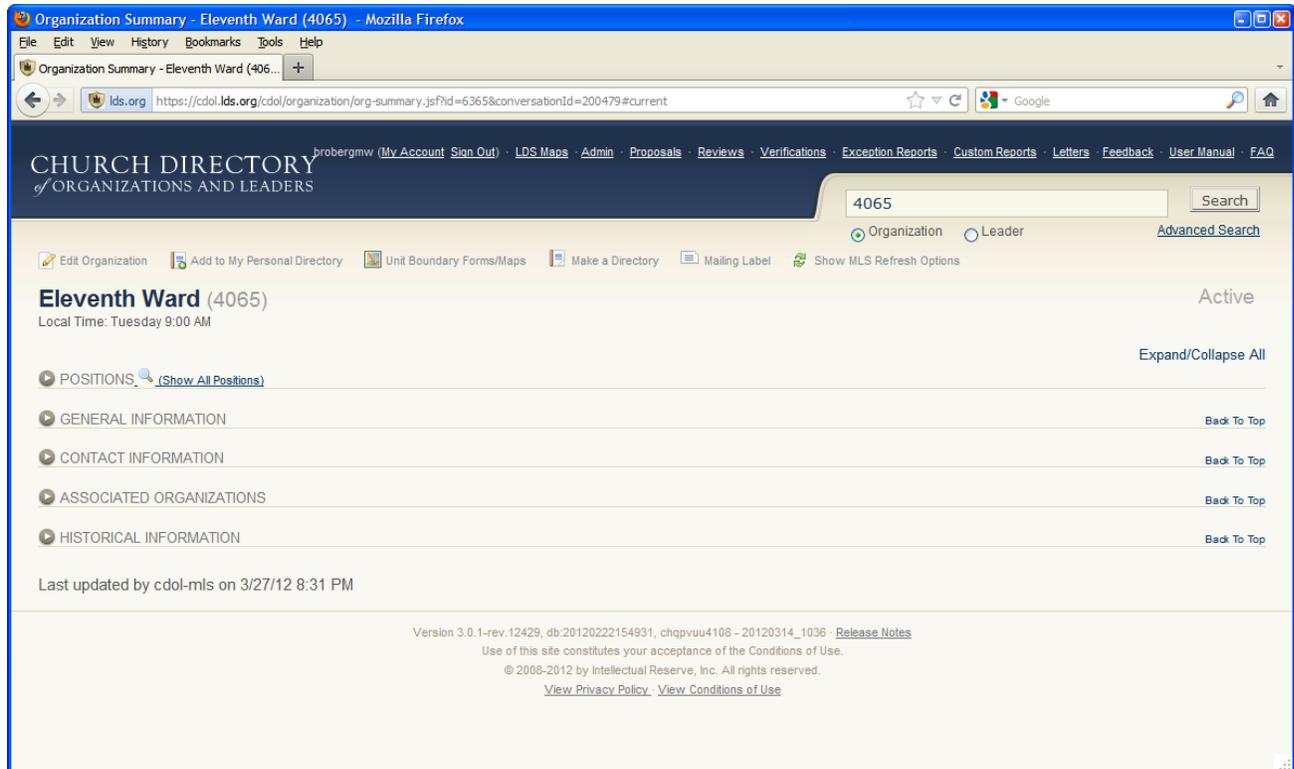
The user can decide which if any sections to expand based on the information regularly used when searching for an organization. If, for example, the names and contact information for leaders are needed, the user may choose to expand the "Positions" section. If the building address is regularly needed, then the "Contact Information" section might be expanded, etc.

(**Note:** Certain sections are only visible based on rights, such as the "Historical Information" section. Not all users will be able to see information in all sections, even if that section is set to display or be expanded.)

2. The second section in the second column allows the user to specify whether advanced searches using political location uses the primary location marker (always populated, but only displays country and usually state/province) or primary location address (not always populated for all organization types, but usually displays country, state/province, **and** city, which is often more useful if populated) to obtain and display results.

3. The third section allows the user to select whether to display names of individuals under the "People" section on the home page sorted by the full name (which would be sorted by the first name or initial) or by the surname.

Once the desired features have been selected/enabled, the user can save the preferences by clicking on "Save, found at the bottom left of the "My Account" page. Once saved, these settings will remain as selected on any computer the user accesses CDOL.

The "My Account" page also displays any active assignments the user currently has that CDOL recognizes, found at the top middle of the page. Since CDOL access is dependent on being listed in an active authorized position, checking the listed assignments is a very good idea.

If a user is serving in an ecclesiastical position but also is an employee for the Church in an assignment that would require CDOL access, the list of assignments is a good way to check that both assignments are listed, to ensure that CDOL access will continue if released from the ecclesiastical calling. Too often leaders who have served for years in multiple assignments are released from one assignment and find they no longer have CDOL access because their employment was not listed in CDOL, and their access to CDOL was based only on the ecclesiastical assignment.