

CDOL Tip of the Week. January 9, 2012

CDOL Search Results: Using Make a Directory to get a formatted report

This tip gives a basic step by step process for creating a nicely formatted report that contains much of the information about organizations and leaders that can be found in CDOL. This instance lists the process for creating a report that shows stakes, wards, and possibly branches in a hierarchical order.

Note: Make a Directory can also be used with Leader searches, but this example will only discuss the Organization search.

1. Please use CDOL to search for a stake organization (or organizations), using either the search field in the upper right corner of the application or the advanced search feature (both search types have been previously discussed in prior tips).
 - a. If the search returned just one result, the link is found above the organization name on the summary page.
 - b. If the search returned multiple results, the link is in the shaded bar above the results area of the search.
 - c. Clicking the link takes brings up a new screen that allows the user to begin designing a directory (or to use an existing template if one has been saved that matches the search type).
2. For this example, click on the “Design a new Stake [search type] Directory” in the center of the application window.
3. That takes the user to the “Organizations” step. For this example, select the option “Include other related organizations,” since for this example we want not only the stake(s), but also any wards and branches below. Selecting that option will display additional options.
 - a. For this example, leave the additional options set to their defaults, since only a second level, but not a third level, is needed, and only active associations are desired in this exercise.
 - b. Click on “Continue.”
4. The next screen allows the user to select the organization associations to include in the directory.
 - a. For this example, select “Child-Branch” and “Child-Ward” by finding those two organizations in the pick list and putting a check mark to the left of each.
 - b. Then click “Continue.”
5. The next screen allows the user to select the positions to be displayed in the directory.
 - a. For this example, under Stake, select “Primary contact” if only the stake president is to be displayed, or “Key positions” if the counselors are to be included.
 - b. Under 2nd Level, again select “Primary contact” or “Key positions.”
 - c. Then click on “Continue.”
6. The next screen allows you to select the contact information to be displayed.
 - a. For this example, use only the position information of “Work,” “Home,” and “Mobile” phones, and perhaps the email address. All of those are found in the third column.
 - b. Then, in the fourth column, “Position Addresses” select “Mailing.”
(Note: selecting these various contact criteria above will display in the report only if the information has been populated in the CDOL database.)

- c. Click on “Continue.”
7. The next screen allows the user to select display options.
 - a. For this example it is preferable to keep all of the defaults.
 - b. Type in a Title, such as “Stake and Ward Leaders.”
 - c. Then click on “Continue.”
8. The next screen displays the summary of the directory choices made in the previous steps.
 - a. Along the bottom, first select “Save Directory Design,” which saves the previously selected options to a template that can be reused without requiring the user to go through step by step again.
 - b. The directory design will be called the “Title” name you typed in the previous screen and will be displayed on the same screen as the option to design a new directory.
 - c. Clicking “Save Directory Design” starts an automatic process that only takes a few seconds to perform, and there will be no additional screens or choices that appear.
9. Then click on “Print Directory.” That starts a process that, when complete, will open a secondary window that gives the user the options to either open or save the completed PDF file (the formatting process can take up to several minutes, depending on the complexity of the report and the quantity of organizations and individuals being formatted).

Although this tip provides only a single example of using the “Make a Directory” feature, users should be aware that the feature can be employed for a greater variety of formatted documents, depending on the search type and the selected criteria and design elements.

Also, because the feature returns a PDF document, the resulting file cannot be used as a primary data source for a merge process without significant change, which would likely remove the formatting and most data groupings. If a merge is needed, users should consider exporting the data to a CSV or Excel file after the initial search is performed rather than using the “Make a Directory” feature.

For additional assistance with Make a Directory, please see the online User Manual or contact the CDOL User Specialist.