

CDOL Tip of the Week. January 23

CDOL Features: Creating your own quick links to people and organizations

A powerful but under-used tool in CDOL is the ability to add people and organizations to your own customized list, which allows the user to pull up an individual or an organization in a few clicks instead of having to type a name in the search field.

On the CDOL home page in the left-hand column are two sections: People and Organizations. After performing a search, either for an individual or an organization, and the user has arrived at the summary page, if the current listing is one that may be used regularly or frequently the user can add the organization or individual to the home page under one of these two sections.

For example, if an administrative assistant in a neighboring organization was listed in CDOL and had information my organization needed each month, adding the assistant to my list of people might be beneficial. To add the administrative assistant to the People section:

1. Search for the individual in CDOL using either an organization search or a leader search
2. Navigate to the individual's summary page, so that the individual's name is listed at the top of the screen (if initially using an organization search, once the organization summary page is reached, the user would click on the name of the individual to go to the person's summary page)
3. Above the person's name on the summary page is a toggle link
 - a. To add a person to the list, click on "Add to My Personal Directory"
 - b. For a person already added to the list, click on "Remove from My Personal Directory"
4. Once a person is added to the list, navigating back to the home page by clicking on the "Church Directory of Organizations and Leaders" logo type in the blue heading field and then looking under "People" (the section may need to be expanded if the preference to keep the section expanded has not been set under "My Account") allows the user to view any individuals listed there
5. To navigate to an individual's contact information, the user clicks on a listed name, which then returns the user to the individual's summary page

The same basic process can be used for an organization, where the link "Add to My Personal Directory" above the organization name can be used to add an organization to the "Organizations" section found on the CDOL home page. Again, once added, the link toggles to "Remove from My Personal Directory." Besides the links found on the summary pages, the listings can also be removed from the home page by clicking on the "X" inside the circle to the right of each entry in the list. Once deleted, the user would need to navigate to the summary page to re-add a listing.