

UMCARES

United Methodist Candidate and Record Entry System



HIGHER EDUCATION & MINISTRY

General Board of Higher Education and Ministry

THE UNITED METHODIST CHURCH

UMCARES Advanced Search

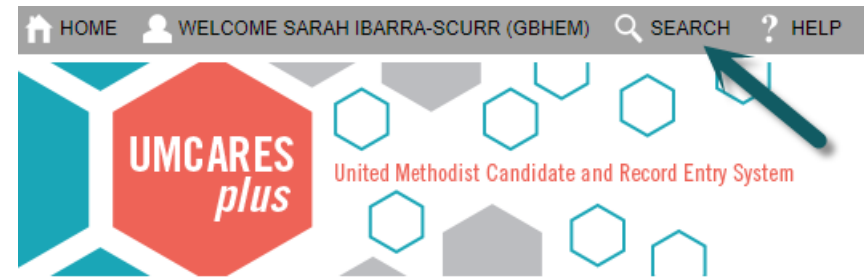


Objectives

- Learn how to access the advanced search portal in UMCARES
- Review the different search types available
- Define the criteria options available
- Demonstrate searches
- Outline best practices in setting criteria

Accessing the Advanced Search

- Advanced search is available to mentor level users and higher
- Click on **Search** in the header bar
- Choose **Advanced** from the teal options bar



Search Options Tabs

- The tabs open search criteria related to the data type
- There are three sections of criteria
 - Tab specific fields
 - Location information – defaults to your conference
 - Account Status – most searches will require the status to be set to “Show Active Registered” to display current users

Advanced Personal Search

Close | Simple | Help

Personal | Track | Roles | Assigned

First Name

Last Name

Preferred Name

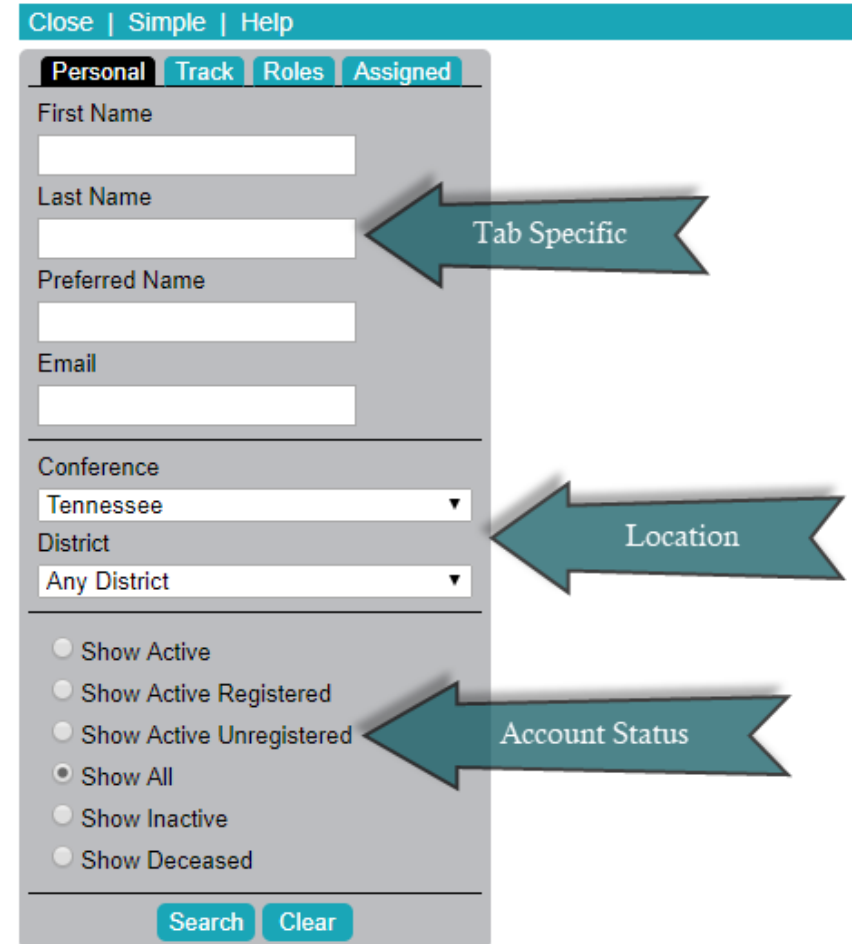
Email

Conference
Tennessee ▼

District
Any District ▼

Show Active
 Show Active Registered
 Show Active Unregistered
 Show All
 Show Inactive
 Show Deceased

Search Clear



The diagram illustrates the search criteria sections with arrows pointing to specific fields:

- Tab Specific:** Points to the First Name, Last Name, Preferred Name, and Email input fields.
- Location:** Points to the Conference and District dropdown menus.
- Account Status:** Points to the radio button options for Show Active, Show Active Registered, Show Active Unregistered, Show All, Show Inactive, and Show Deceased.

Search Options Tabs Cont.

- Tab specific criteria available:
 - Personal – First Name, Last Name, Preferred Name, Email
 - Track – Track Name, Track Status, Step Name, Track Status, Date Range
 - Roles – Constituent Role (example: Candidate, Mentor, BOM Staff Member)
 - Assigned – Role, Assigned Members (example: all mentees for Jane Doe)

Advanced Personal Search

Close | Simple | Help

Personal Track Roles Assigned

First Name

Last Name



Personal Search

- The Personal Search can identify a constituent in UMCARES when only part of their personal contact information is known

Advanced Personal Search

Close | Simple | Help

Records Found: 1 [CSV](#) [Export CSV](#)

Personal | Track | Roles | Assigned

First Name


Last Name

Preferred Name

Email

Conference

District

PERSONAL (NAME, TITLE ROLE)	LOCATION (CONFERENCE, DISTRICT)
 Sarah Ibarra-Scurr GBHEM Staff	Tennessee, Unknown, Unknown

Personal Search Demonstration

- Using the Personal Search option, search for a user in the system with the last name of Smith and the only the first letter of their first name.

Advanced Personal Search

Close | Simple | Help

Records Found: 1 [Export CSV](#)

Personal | Track | Roles | Assigned

First Name


Last Name

Preferred Name

Email

Conference
 Tennessee ▼

District
 Any District ▼

PERSONAL (NAME, TITLE ROLE)	LOCATION (CONFERENCE, DISTRICT)
 Sarah Ibarra-Scurr GBHEM Staff	Tennessee, Unknown, Unknown

Track Search

- The Track Search uses criteria based on track status and step status within a date range
- The search can be based on track alone, or based on track and step information
- The date range can be based on Track Status or Step Status
- The District drop down can be used to narrow the search to a specific district within the conference

Personal **Track** Roles Assigned

TRACK

Include Deactivated

Candidacy (GBHEM) ▾

status In Progress ▾

STEP

Mentor Signature ▾

status Complete ▾

DATE RANGE

based on Track Status ▾

from 1/1/2018

to 3/8/2018

Conference

Tennessee ▾

District

Any District ▾

Show Active

Show Active Registered

Show Active Unregistered

Show All

Show Inactive

Show Deceased

Search Clear

Track Search Demonstration

- Search for active candidates that have paid their candidacy fee between January 1 and today in a specified district

Personal
Track
Roles
Assigned

TRACK

Include Deactivated

Candidacy (GBHEM) ▼

status In Progress ▼

STEP

Administration Fee for the Candidacy ▼

status Complete ▼

DATE RANGE

based on Step Status ▼

from 1/1/2018

to 3/9/2018

Conference

Tennessee ▼

District

Harpeth River ▼

Church

Any Church ▼

Show Active

Show Active Registered

Show Active Unregistered

Show All

Show Inactive

Show Deceased

Search
Clear

Roles Search

- The Roles Search uses criteria based on a constituent's role, district, and account status
- This search can be best utilized for pulling lists, such as current mentors, MAS, BOM staff members etc.
- When pulling a list of constituents that are currently serving in a role, the account status must be set to "Show Active Registered"

The screenshot shows a search interface with four tabs: Personal, Track, Roles, and Assigned. The Roles tab is selected. Below the tabs, there are three dropdown menus: Roles (set to Candidacy Mentor (GBHEM)), Conference (set to Tennessee), and District (set to Any District). Below these are six radio button options for account status: Show Active, Show Active Registered (which is selected), Show Active Unregistered, Show All, Show Inactive, and Show Deceased. At the bottom right, there are two buttons: Search and Clear.

Role Search Demonstration

- Search for all current mentors for your annual conference

Personal Track **Roles** Assigned

Roles
Candidacy Mentor (GBHEM) ▼

Conference
Tennessee ▼

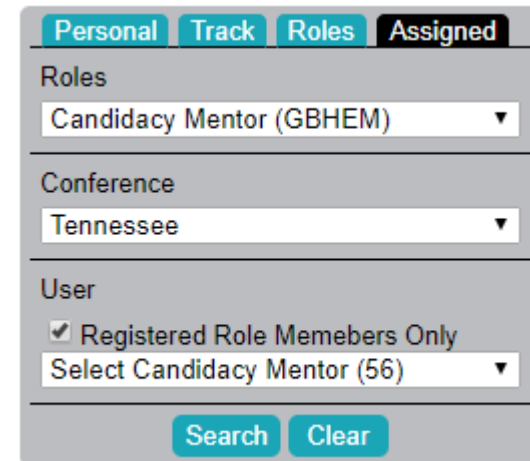
District
Any District ▼

Show Active
 Show Active Registered
 Show Active Unregistered
 Show All
 Show Inactive
 Show Deceased

Search Clear

Assigned Search

- The Assigned Search is used to search for constituents with a specified relationship to a selected individual
- Example A: all candidates with Joe Smith as their mentor
- Example B: all candidates that chose Jane Doe as their MAS
- Assigned search does not contain a filter on Account Status, however all results will be Active users.



The screenshot shows a search filter interface with four tabs: Personal, Track, Roles, and Assigned. The Assigned tab is selected. Below the tabs are three filter sections: Roles, Conference, and User. The Roles section has a dropdown menu set to 'Candidacy Mentor (GBHEM)'. The Conference section has a dropdown menu set to 'Tennessee'. The User section has a checked checkbox for 'Registered Role Members Only' and a dropdown menu set to 'Select Candidacy Mentor (56)'. At the bottom of the filter interface are two buttons: 'Search' and 'Clear'.

Assigned Search Demonstration

- Search for all candidates assigned to a specific mentor in your annual conference

Personal Track Roles **Assigned**

Roles
Candidacy Mentor (GBHEM) ▼

Conference
Tennessee ▼

User
 Registered Role Members Only
Select Candidacy Mentor (56) ▼

Search Clear

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Questions



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