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
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)
Personal Search

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

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

• The Roles Search uses criteria based on a constituent’s role, district, and account status.
• This search can is best utilized for pulling list, 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”
Role Search Demonstration

• Search for all current mentors for your annual conference
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.
Assigned Search Demonstration

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

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