CIOC FOR NEWBIES: INTRO SEARCHING & DATA MANAGEMENT

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INTRODUCTION

This session is intended for those who are new to CIOC or want a general refresher on CIOC's searching and data management tools

We will be reviewing the various pages for searching, search results, updating, feedback, mail/fax form, email update request, reminders, and bulk tools

On each page, we will discuss what can be done on the page, options that could change what you currently see or have access to on that page, and best practices if applicable.

WHAT WE WILL BE COVERING...

This session provides an overview of how to use search and manage Community Information data in CIOC. We will cover as much as we can cover in the time available, from:

1. How to use Basic and Advanced Search features

2. How to work with your search results (incl. mapping tools and "My List")

3. Overview of the Record Details page

4. Record Updating and Feedback (includes a brief introduction to Taxonomy and Publication management)

5. Requesting record updates

6. Managing deleted records

7. Using "Bulk Tools" for data management on multiple records

8. The basics of using Reminders

9. Using search tools to monitor data quality and manage record updates

WHAT WE WON'T BE COVERING...

This session is not intended to explain setup, security, design, statistics, exporting, publishing, vacancy/capacity management, APIs, etc...

While we will discuss some available setup options, we will not be getting into the details about how to make changes.

A limited amount of time will be spent on Taxonomy and Publication management; advanced sessions on these topics will be part of future training sessions.

THE "BASIC" SEARCH

The Front Page (aka "Basic") Search can be completely customized, so almost anything could be configured for this page depending on how the current View has been configured.

A standard Basic Search page will include a detailed menu for all logged-in users in addition to the header and footer menus available on all pages.

THE "BASIC" SEARCH: STANDARD OPTIONS

On a standard basic search page, options for public and staff searches may include any of:

- Search forms including any from:
  - Keyword, Community, "Quick List", Age, Vacancy/Capacity/Waitlist, Record Number, Language, Records with Volunteer Opportunities, Records with Websites
- "Browse" searches, including any from:
  - Name, Subject (Thesaurus), Service Category (Taxonomy), or Industry (NAICS)
- Specialized Child Care search
- "Topic" Searches (specialized topic search forms based on Publications)
- "Quick" Searches (preselected search criteria)

STAFF-ONLY SEARCH OPTIONS

Depending on their permissions and what is configured for the current View, logged-in users may see links to some additional search options such as:

- Advanced Search
- Saved Searches
- Basic and Advanced Taxonomy Searches

ADVANCED SEARCH

Advanced Search introduces additional search options, including:

- Searching multiple record numbers
- Advanced keyword, age, volunteer opportunity searching
- Proximity (map) and address searching
- Custom date and text field searches
- Search by email status
- Detailed include/exclude search using publications, headings, and checklists
- Record language, record owner, public or deleted status, sharing status, child care status, number of employees, and more...over 100 search options in total
- Or use "SQL" to search to search by almost any criteria you can imagine

Many of the search types on Advanced Search are actually available to the public, and can be built into custom-create "Basic" search forms, added as "Quick" searches, or links in a menu.

WORKING WITH YOUR SEARCH RESULTS

Changing your Display Options

Understanding the "Alert Column"

Mapping your Search Results

Creating a New Results Set

Refining your Search

Saving your Search

Adding to "My List"

THE RECORD DETAILS PAGE

Configurations of this Page
- Standard vs. Agency-Site-Service
- Customized fields and groups

Temporarily Switching Views
- Preview the record in another View you have access to (e.g. what will the public see when they access the record?)

Search Links on this Page
- Organization Level Links
- Agency, Site and Program Search Links
- Volunteer Opportunities
- In-field Links (built-in and custom)
- Other Search Results

THE RECORD DETAILS PAGE: ACTIONS

Main Record Actions

- Add to My List, Add to Client Tracker
- Suggest an Update, Suggest New Opportunity
- Other Languages for this record
- Print Version, PDF Version
- Share Record with "Add This"
- View Feedback (staff only)
- Record Reminders (staff only)

Drop-down Actions (staff only)

- Update, Copy, Delete record
- Create Equivalent (alternate languages)
- Update Publications
- Update Service Categories (Taxonomy)
- Email Update Request, Email Update All Opportunities Request
- Mail/Fax form
- Create New Opportunity

WHAT IS FEEDBACK / SUGGEST A RECORD?

Feedback is a change "suggestion" that can come from a variety of places, including...

- from a member of the public or an agency through a non-logged in view
- from someone who is logged-in but doesn't have permission to update the record directly

Feedback does not change or create a record; it must be added or updated by someone with the necessary permissions

Feedback sits in the "Review Feedback" page until it is processed by the data manager

Feedback information will also arrive as an email notification to the data manager, unless submitted by logged-in staff with the permission to block the e-mail from being sent

WHAT IS UPDATE / ADD RECORD?

Adding / updating creates or changes a record directly

Record additions and updates can only be performed by logged-in users with permission to add records or update the current record

You can **add** a new record by:

- The *"Add Record"* link from the **Main Menu**
- The *"Create Record"* link from a new suggestion located on the **Review Feedback** page

You can **update** an existing record by:

- *"Update Record"* in the Action Drop-down from the **Record Details** page
- The *"Update"* link from a change suggestion on the **Review Feedback** page
- The *"Update"* link from your **Search Results** if Display Options include it

MORE ABOUT FEEDBACK / SUGGESTION FORMS

Feedback forms can be used by staff who don't have permission to update the record directly, or to monitor the changes contributed by new staff

Feedback forms are not the same as Update Forms

- Feedback forms are less complex than record update forms, and in some cases combine multiple components from the update form into one simple field.
- When the Feedback form is different from the Update Form, the automatic "Update" button won't be available
- As the software evolves, the feedback form is coming to more closely resemble the update form in most cases to make the process easier for data management staff

USING FIELD HELP TO GUIDE GOOD PRACTICES

Field Help should be configured and reviewed for every field you use in the database

The same Field Help is used by both staff and the public, so it needs to work equally well for both

Field Help should include standards and formatting information, as well as information about the purpose of the field and how it is used

The CIOC technical field reference can be used as resource to help you create your public/staff Field Help, and is available from:

https://kclsolutions.desk.com/customer/portal/articles/2108436

EMAIL UPDATE REQUESTS

Use "Update Schedules" to help you remember appropriate times for next updating the record; 12 months is generally a good standard, but 6 or 18 months may be appropriate for some resources

When searching for records to send email update requests, create a search that only includes records that can accept an update request (via Advanced Search) and that have not been emailed in at least 14 days

EMAIL UPDATE REQUESTS – NO REPONSE!

If you are not getting responses to your email update requests, first make sure your recipients are receiving them

Emails can easily be caught in spam filters; this is especially likely if the Agency email setup has not been configured correctly, if you do not respect requests to have email updates blocked, or if you send out requests too frequently

Unfortunately, many data managers find it necessary to follow up by phone to prompt a response, so don't rely completely on automated update requests

MAIL / FAX FORM

If you do not have a valid email, or are unable to get a response to email updates, this can be used as a backup means to contact organizations

The Mail / Fax Form is designed to be easily printable so that it can be sent to the organization via mail or fax

If you need to request a new record via Mail / Fax, create a non-public empty shell record with the organization and/or program names and then generate a Mail / Fax form from that record

MANAGING DELETED RECORDS

Records are first *marked* deleted, where they remain accessible through advanced search and in reports, and then permanent deletion where there are removed entirely

Record Deletion is a distinct set of permissions; Users must have record deletion privileges to mark records as deleted, and only Super Users can permanently delete records.

It can be useful to keep records in the "Marked Deleted" state for an extended period to prevent rapid record number re-use (which can confused the public following links) and ensure the information is available for reporting

USING "BULK" TOOLS ON MULTIPLE RECORDS

To Access "Bulk" Tools, ensure that "Select Checkbox" is enabled in your search results

Available "Bulk" Operations on multiple records include:
- New Reminder
- Email Update Request
- Print List or Map
- Generate Statistical Report (Usage)
- Change Record Owner, Non-public Status, Deleted Status, or Parent Agency
- Add or Remove various Checklists and Classifications
- Use the "Find & Replace" Tool
- Regenerate Geocoding (Map location)
- Export or Share Records

INTRO TO REMINDERS

Reminders can help you remember to take some action in the database

They can be assigned to you or others in your database; one person or a group of people

Reminders can optionally be associated with one or more records

You can indicate whether the reminder needs to be seen and dismissed by everyone, or dismissed by the first person that takes action

Create a Reminder from your Search Results, Record Details, or the main Reminders list page