


## Chapter 7: Searching, sorting, bookmarking and grouping.

### Searching

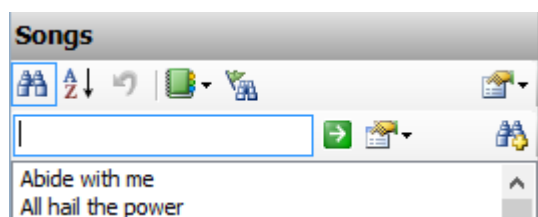
CMO has two types of facilities to aid with searching for records. The first type of search is called a basic search


#### Basic searching


In each section list there is a  icon in the toolbar. Clicking on this button will reveal the search bar.



**Tip:** Pressing Ctrl+F will also display the search bar.



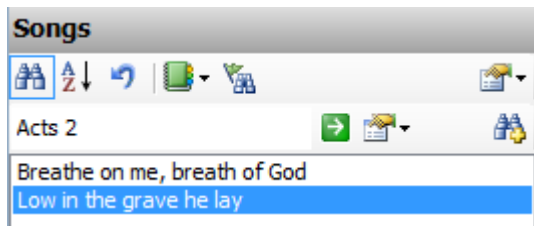
You can enter a search phrase and press enter or click on the  button to perform the search.

The  button allows you to select on which fields to perform the search. Each section has its own list of options:


Songs	Meetings	Contacts	Resources
All	All	All	All
Title	Description	First name	Description
Author Words	Theme	Surname	Serial Number
Author Music	Bible Reference	Address line 1	Notes
Arranger	Other information	Address line 2	
Source		Suburb	
Copyright		State	
Lyrics		Phone	
Themes		Mobile	
Bible Reference		Email	
CCLI Number		Notes	
Notes			

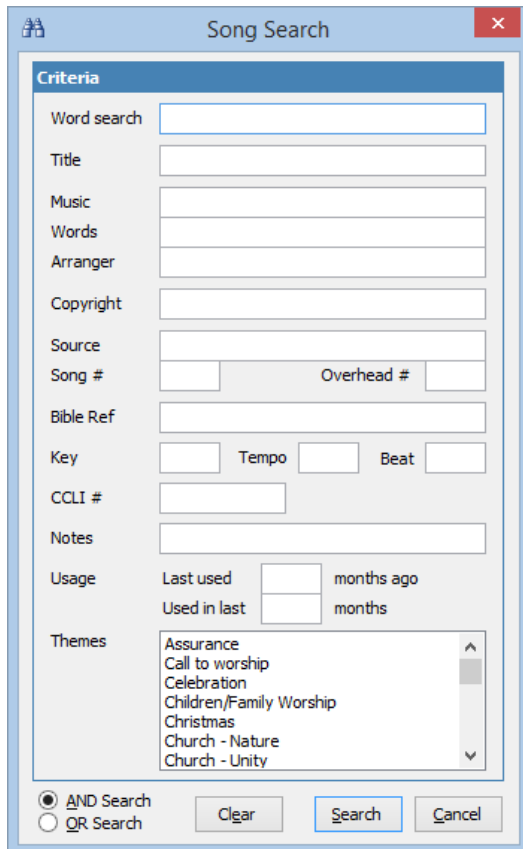
The "All" item should be initially selected. This means the search will be performed on all the fields available in that section.

By selecting one of the items in the list will restrict the search to only that field. For instance, to just search for songs based on Bible Reference, select "Bible Reference" in the list, then enter a Bible reference in the search field, like "Acts 2", and press enter.



### Advanced searching

Occasionally it might be necessary to perform a more complex search. To open the advanced search window, click on the  button, or press Ctrl+Shift+F.



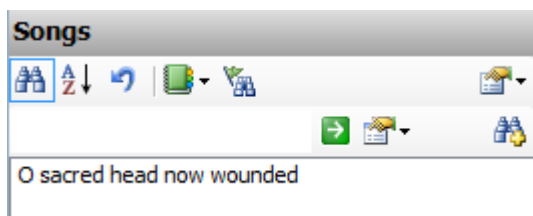
For songs, this is the advanced search dialog. This allows you to fine tune your search. You can add multiple different search terms. For instance, you might like to do search lyrics for the word "love" and also search for a Bible reference in John:

The screenshot shows the 'Song Search' dialog box with the following criteria:

- Word search: love
- Title: (empty)
- Music: (empty)
- Words: (empty)
- Arranger: (empty)
- Copyright: (empty)
- Source: (empty)
- Song #: (empty)
- Overhead #: (empty)
- Bible Ref: John
- Key: (empty)
- Tempo: (empty)
- Beat: (empty)
- CCLI #: (empty)
- Notes: (empty)
- Usage: Last used (empty) months ago, Used in last (empty) months
- Themes: Assurance, Call to worship, Celebration, Children/Family Worship, Christmas, Church - Nature, Church - Unity

Search options:  AND Search,  OR Search. Buttons: Clear, Search, Cancel.

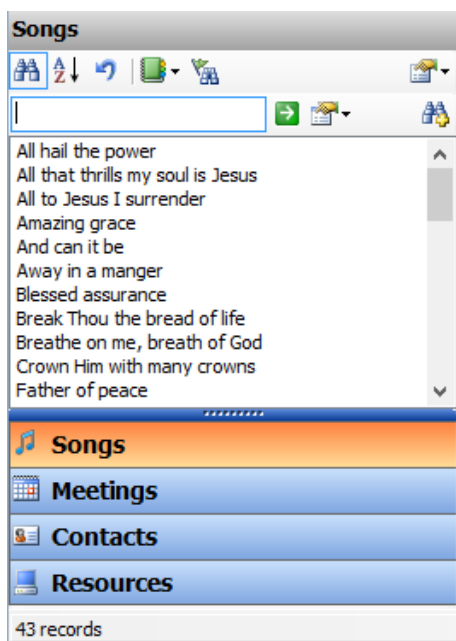
This search returns 1 record in our sample database.



This was an "AND" search. That is, the search was looking for any instances of lyrics with "love", as well as a Bible reference from John.

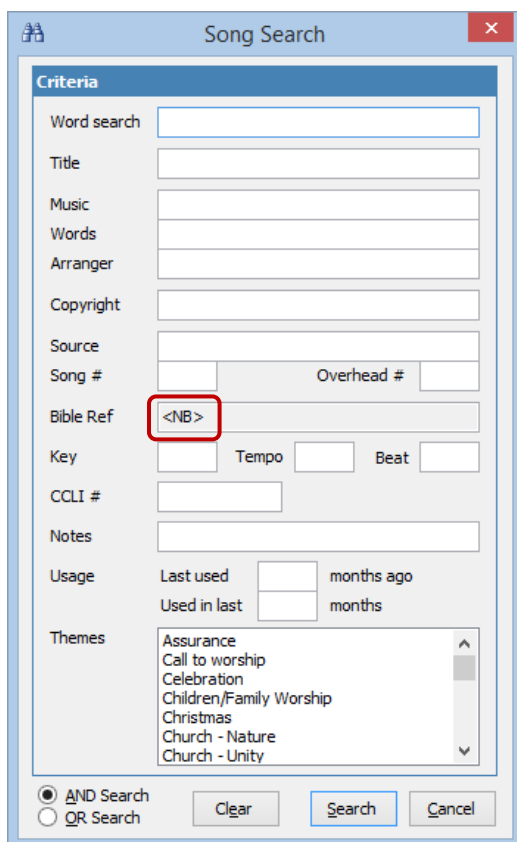
We could also do an "OR" search. To do this click on the "OR search" radio button on the advanced search page. This will look for any songs with "love" in the lyrics, or any songs with "John" in the Bible reference.

In this case, 43 records were found.



The advanced search dialog also provides the ability to search for blank or non-blank values.

For example, say you wanted to find all the songs that contain a Bible reference. To achieve this you would open the advanced search dialog, put the cursor in the Bible reference field and press Ctrl+N (N for Non-Blank).



Notice that the field has been changed to "<NB>" (Not Blank).

This search results in 44 records.

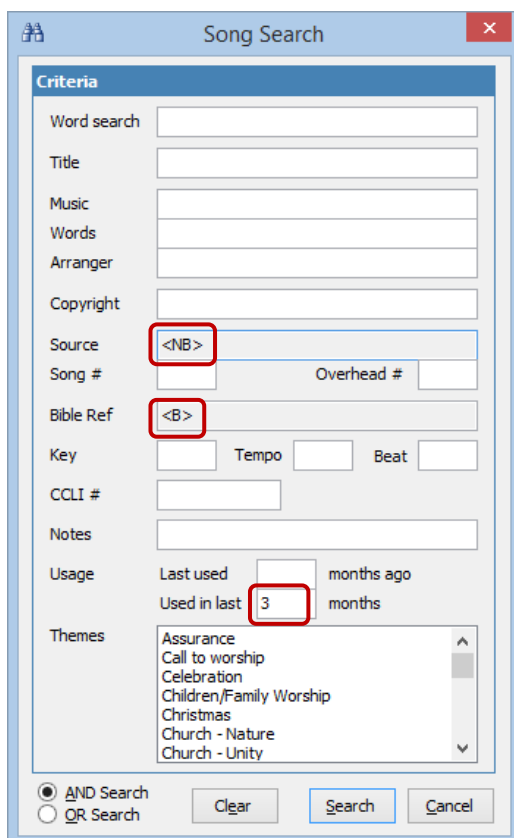
To search for all songs that don't have a Bible reference, you would press Ctrl+B (B for Blank).

The screenshot shows a 'Song Search' dialog box with a 'Criteria' section. The 'Bible Ref' field is highlighted with a red box and contains the text '<B>'. Other fields include 'Word search', 'Title', 'Music', 'Words', 'Arranger', 'Copyright', 'Source', 'Song #', 'Overhead #', 'Key', 'Tempo', 'Beat', 'CCLI #', 'Notes', 'Usage', and 'Themes'. The 'Usage' section has 'Last used' and 'Used in last' fields with 'months ago' and 'months' labels. The 'Themes' list includes Assurance, Call to worship, Celebration, Children/Family Worship, Christmas, Church - Nature, and Church - Unity. At the bottom, there are radio buttons for 'AND Search' (selected) and 'OR Search', and buttons for 'Clear', 'Search', and 'Cancel'.

This results in 35 records.

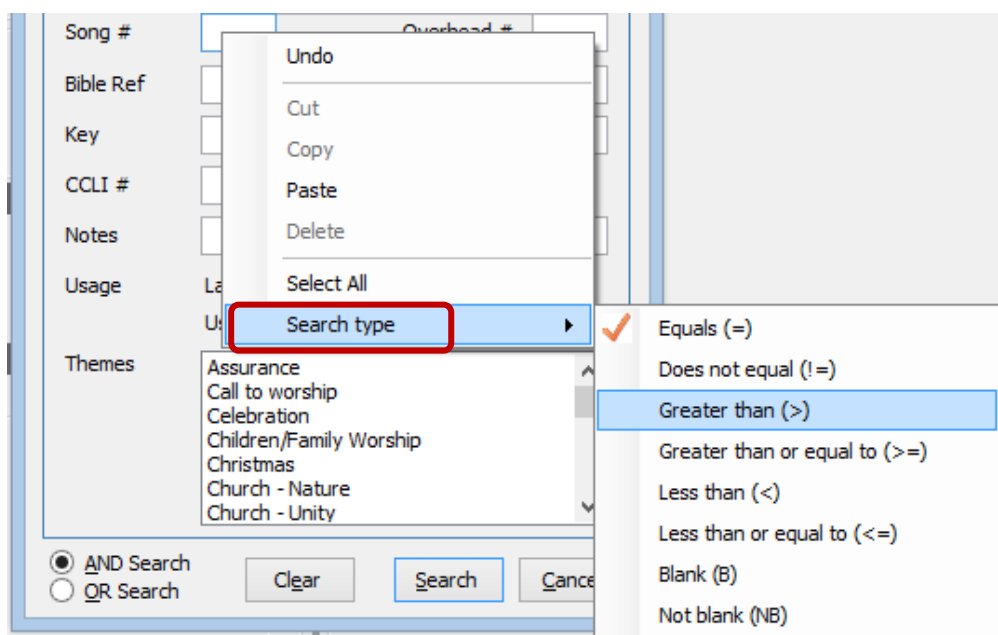
To reset the field so you can enter a Bible reference, either click on the "Clear" button, or press Ctrl+R (R for Reset) in the Bible reference field.

The advanced search dialog allows you to combine different search criteria. So, you can search for all records that have a source, but don't have a Bible reference, and have been used in the last 3 months:

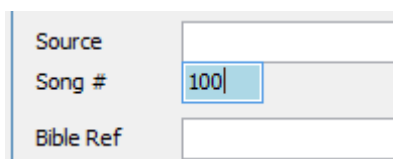


There is also the ability to change the type of search performed. For instance, you might want to search for all records where the song number is greater than 100. For this example we would need to have entered a song number into the records.

To do this type of search, right click on the "Song #" field to bring up the context menu, and select the "Search type" option.



There can be a variety of options here, depending on the type of field. The "Song #" field is numeric, so we have "Greater than" and "Less than" options. For this search we want "Greater than", so we select that item, and enter 100 into the field.




A screenshot of a search dialog box. It has three input fields: 'Source', 'Song #', and 'Bible Ref'. The 'Song #' field contains the number '100' and has a light blue background. The other fields are empty.


When the default search type has been changed for a field, the background colour of the field will change to light blue.

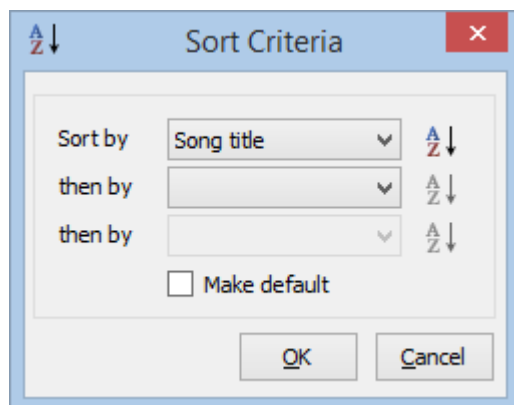
The ability to change the search type is available for most of the fields where a text box is used for data entry, across all the advanced search dialogs.

### Resetting the list

After performing a search, to clear the results and return to the full list, click on the  button, or press F2.

## Sorting

You can sort lists in a number of ways. To display the sort options, click on the  button in the toolbar above the list (or press F2 on the keyboard). Regardless of which section is active, a dialog similar to the following will be displayed.




A screenshot of a dialog box titled 'Sort Criteria'. It has a title bar with a sort icon and a close button. The dialog contains three 'Sort by' dropdown menus. The first dropdown is set to 'Song title' and has a sort icon to its right. Below the dropdowns is a checkbox labeled 'Make default'. At the bottom are 'OK' and 'Cancel' buttons.

Here you can specify up to 3 sort criteria for the list.

For the song list, the default sort criteria is by Song title.

For the contact list, the default sort criteria is by Surname.


For the resource list, the default sort criteria is by Description.

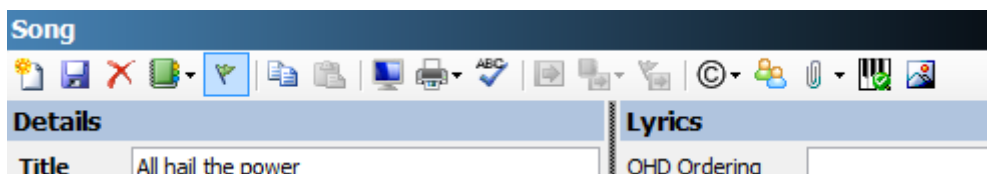
You can override the default sort by selecting your preferred sort criteria from the drop downs, and then checking the "Make default" checkbox, and clicking OK. Then, whenever the program is loaded, or the "Reset search/sort criteria" button  is pressed, your sort criteria will be used.

## Bookmarking

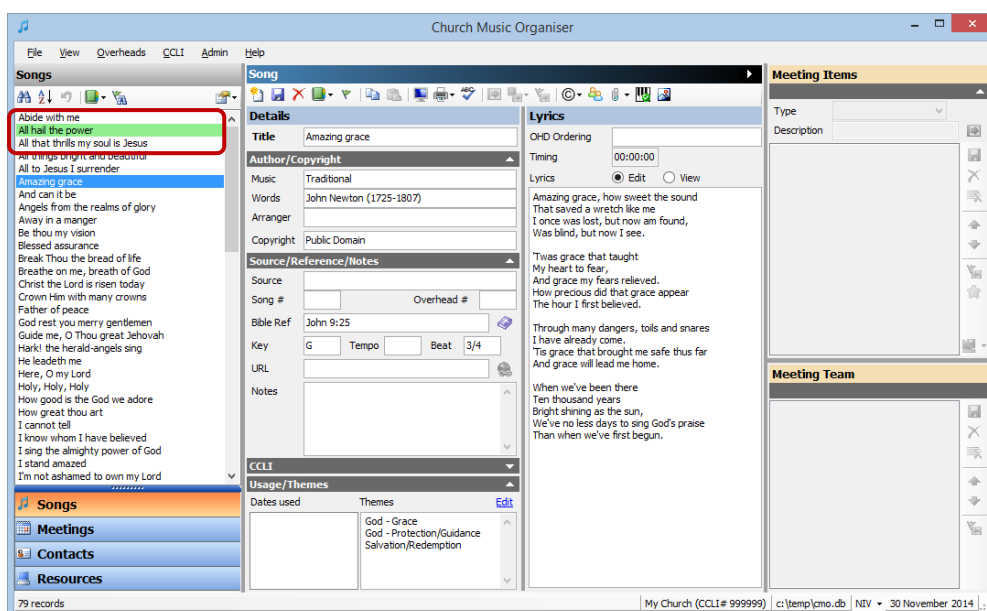
Sometimes it's handy to mark items you want to examine in more detail later. For instance, when performing searches, you might want to make a note of one or two of the search results, then perform another search, note a few more of the results, and then look at all the items you noted at the end. In CMO, this is called "bookmarking".


### Adding bookmarks

To bookmark an item, select the item in the list and click on the  button in the toolbar, or press Ctrl+M on the keyboard.

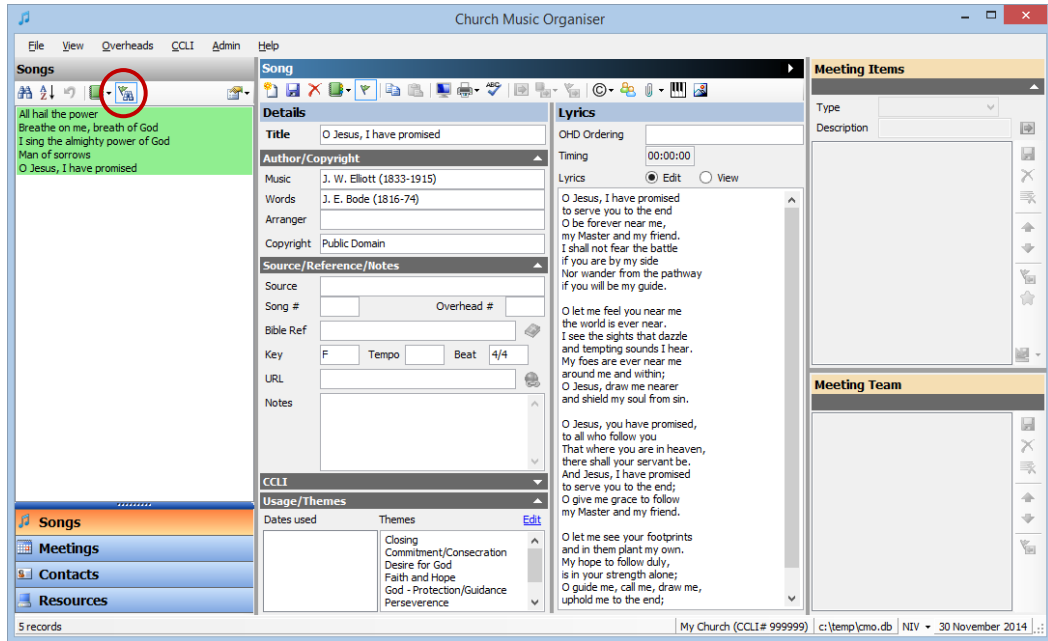


Once marked, the item will be highlighted in the list.




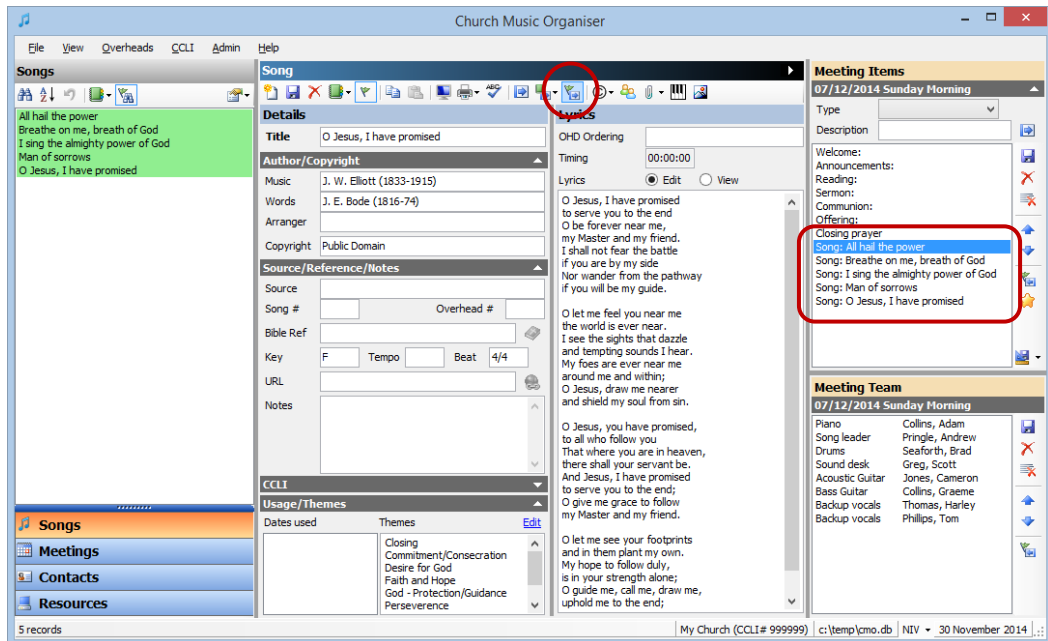
You can quickly display all your bookmarked items by click on the  button in the section list toolbar.






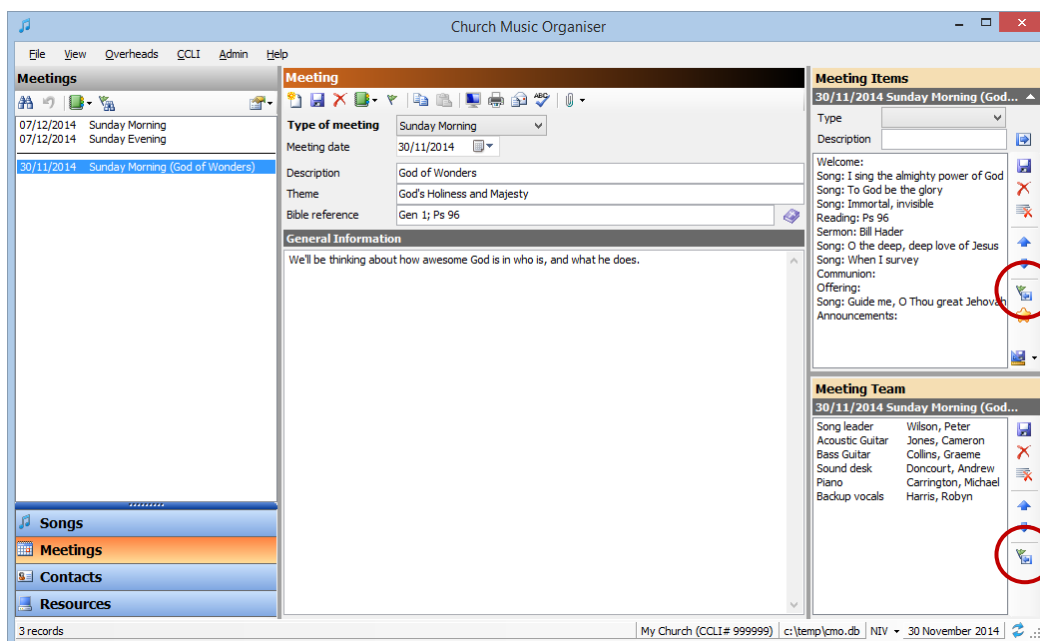
## Adding bookmarked items to a meeting


Once you have bookmarked items, you can quickly add them to the current meeting by clicking on the  button in the song toolbar.



## Bookmarking songs or contacts from a meeting

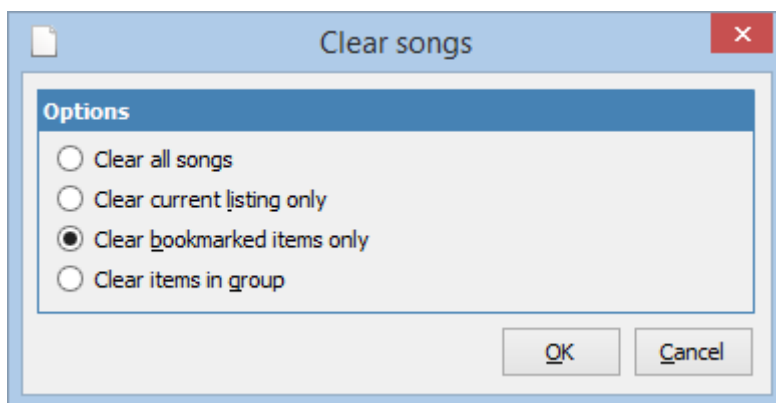
You might want to bookmark all the songs from a previous meeting. To do this, select the meeting from the meeting list, then click on the  button in the meeting items toolbar.



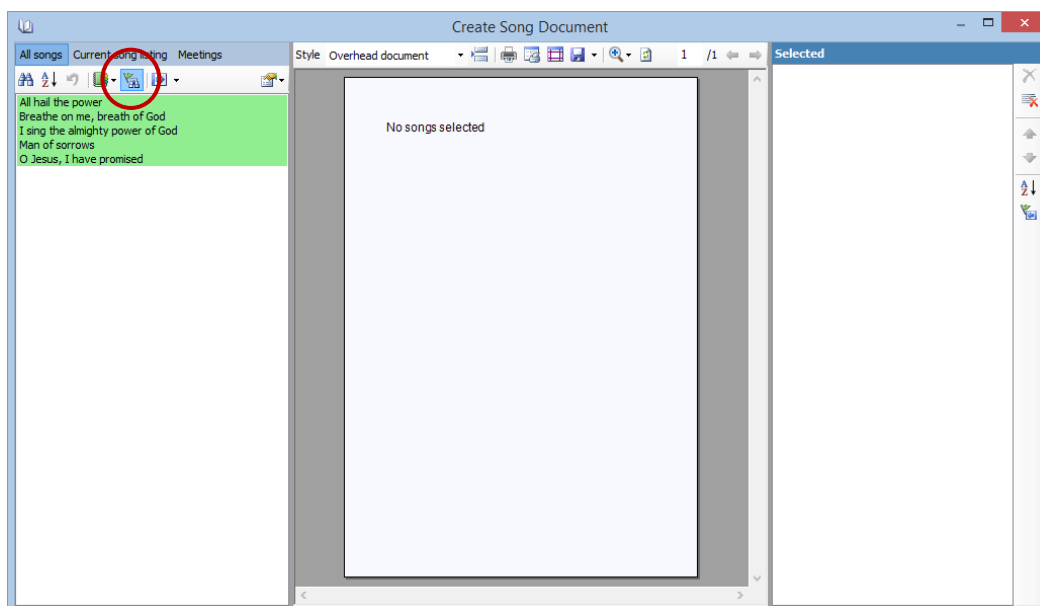
You can also bookmark all the contacts from a meeting by clicking on the  button in the meeting team toolbar (see above).



## Using bookmarks in the system

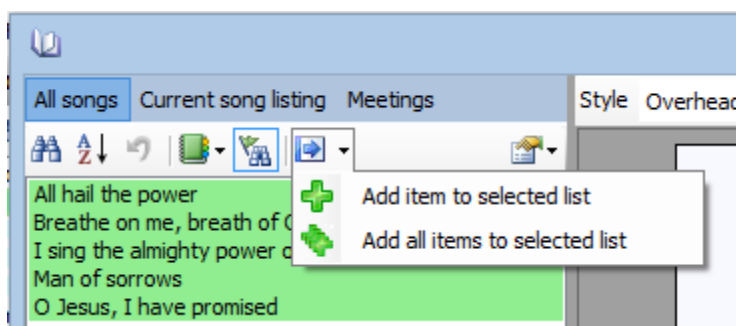
Bookmarks are used in a number of other places in the system. For instance, if you want to remove all the bookmarked songs from the database, you would go to the "Admin → Maintenance functions → Clear songs..." menu, and select "Clear bookmarked items only."



Many parts of the system display a song list where items can be selected and added to a working list. For instance, when creating song documents (from the "File → Create song document..." menu), the same toolbar options are available.



Clicking on the  button will show all the bookmarked items. You can then add all the bookmarked items to the selected list by clicking on the dropdown part of the  button in the toolbar and selecting "Add all items to selected list".



## Grouping

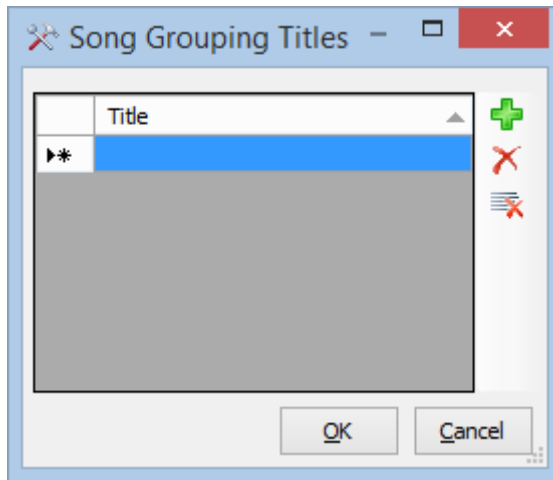
Bookmarked can be useful, but they are limited. There is no distinction between bookmarked items, and no meaning given to bookmarked items. They are just marked. If two people were to use the system and one person was to book mark a few items, the second person wouldn't know why those items were bookmarked and what is important about them.


The alternative to bookmarking items is grouping. Grouping allows a description to be given to the items. We've covering grouping contacts in chapter 5, where we created different teams. We can do the same things with songs, resources and meetings.

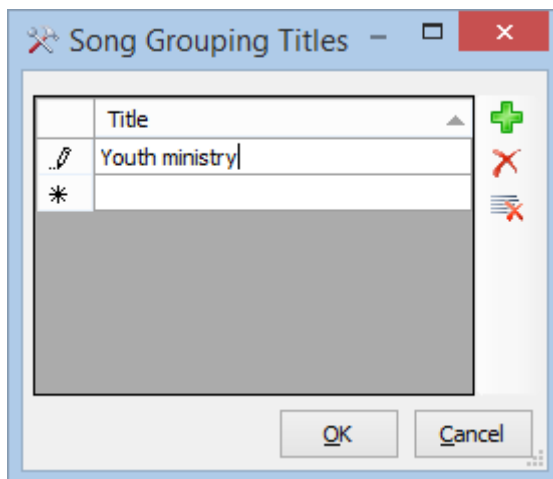
Let's look at a specific scenario. Let say we have two lists of songs. One list is used by the youth ministry for youth events. Another list is used for a conference.


### Creating groups

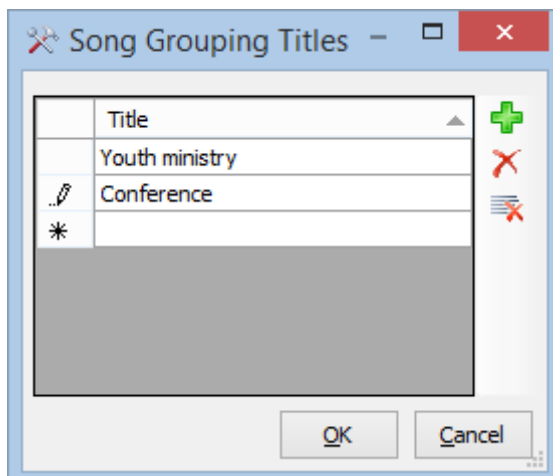
To create our groups, let go to the "Admin → Song grouping titles..." menu.



Here we can add all the song groups we need. Click on the  button to create a new group.

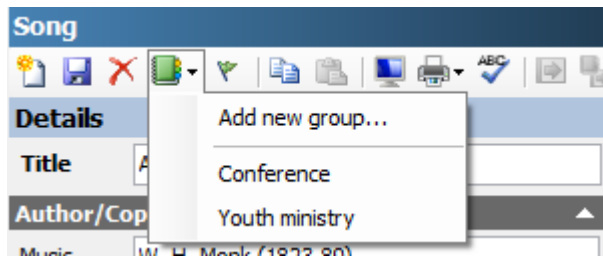


Enter "Youth ministry" and press enter. Then click on the  button again to add the second group.



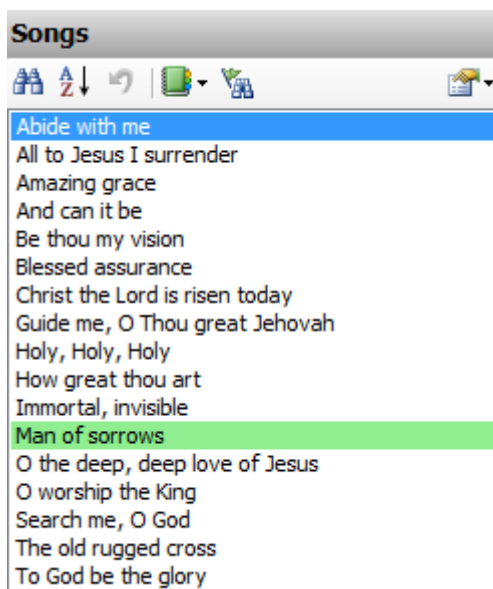
Enter "Conference" and press enter. Click OK to save these groups.

Now, on the song toolbar, we should have two groups available.

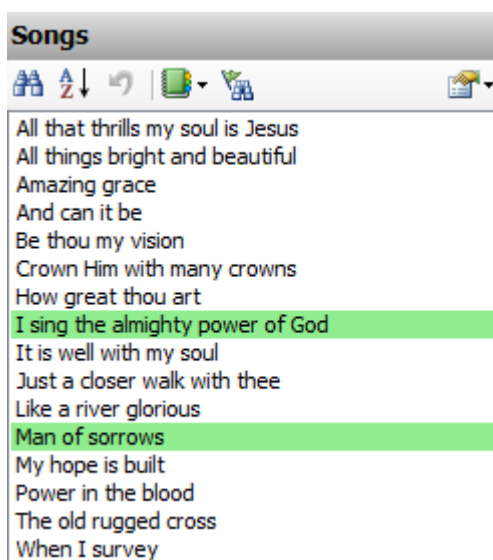


We can now add songs to these groups by clicking on the group title in the dropdown list. Some songs will be in both groups.

Here's the "Conference" list.



And here's the "Youth ministry" list.

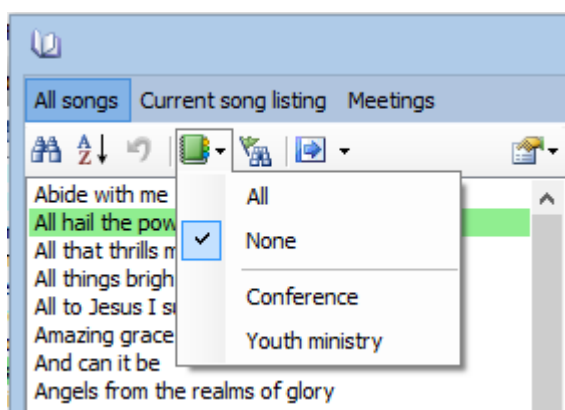


Notice that a few songs, like "Amazing grace", "Be Thou my vision" and "The old rugged cross" are in both lists. A single song can be in any or all groups. This means that you don't have to have multiple copied of songs in your database that are used for different purposes.

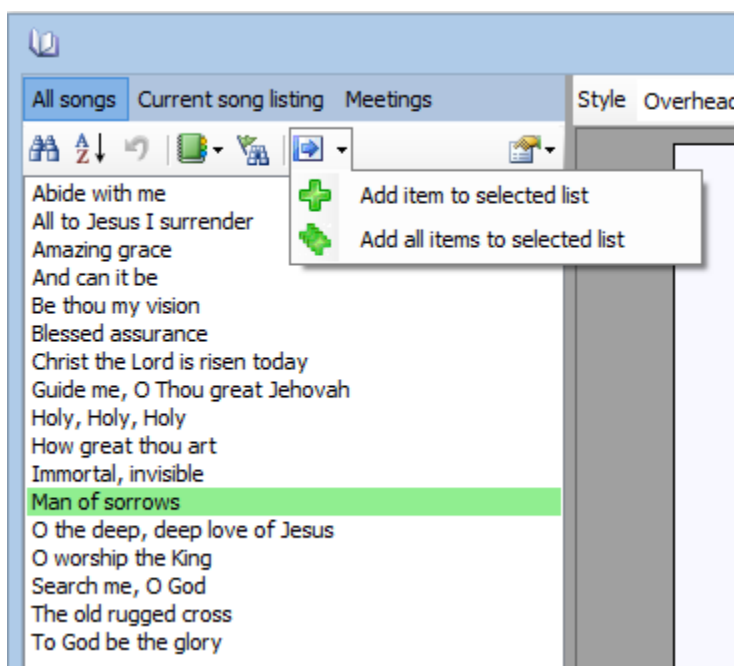
**Note:** There still might be reasons to have multiple copies of songs in your database. You can have several copies of "Amazing Grace" if you want to. But by using grouping, many of the normal reasons for having multiple copies are removed.


### Using groups in the system

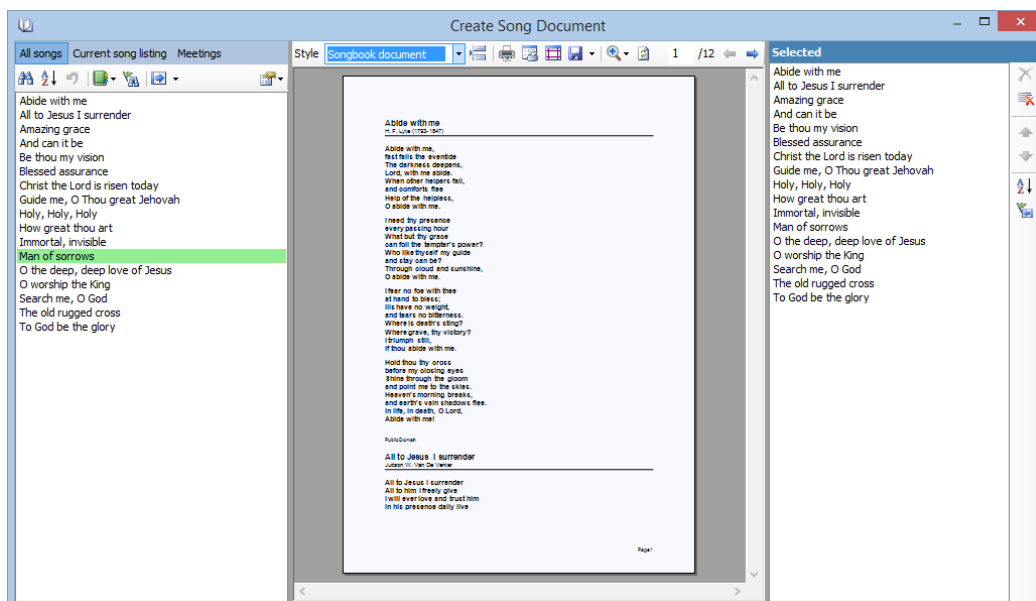
Once you have groups established, using them is similar to using bookmarks. For instance, on the "File → Create Song Document.." dialog, we can select the Conference group, and create a song book document which will be handed out to attendees.



In the toolbar, click on the group dropdown, and select "Conference".



You can then add all the items from the group to the selected list by clicking on the dropdown part of the  button in the toolbar and selecting "Add all items to selected list".



### Summary

In this chapter we've looked at basic and advanced searching, and how to sort lists. We've also looked at how to bookmark and group items, and what things can be done with these facilities.