Master Coding System Enhancements

Created by Alex Clay, last modified about 13 hours ago

CDM+ 9.3 and DonorWorks 9.1 include a number of changes that improve the master coding system.

Terms

Strong efforts have been made to standardize on these terms throughout the program.

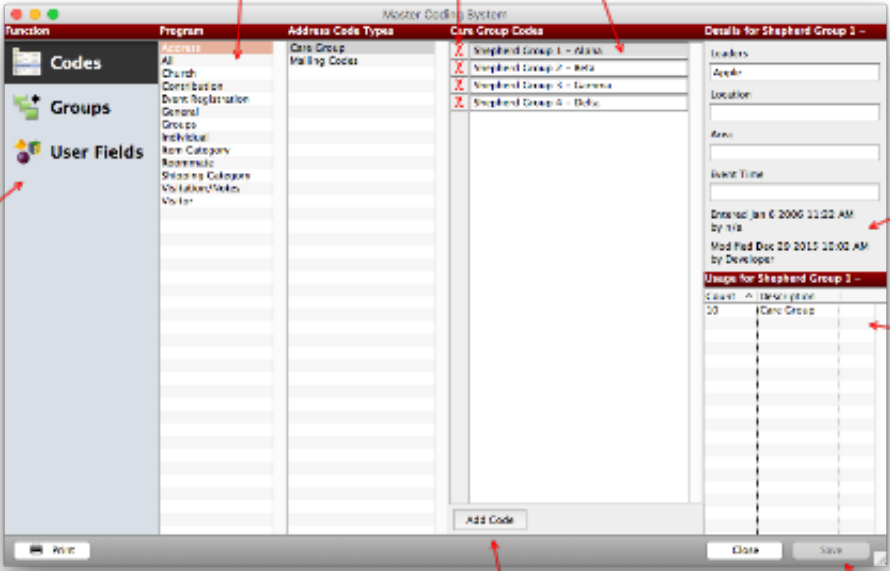| New Term	Former Term	Meaning	Usage	Example
Code Type	Built-in Code Type	A built-in type for categorizing and organizing records.	Available code types are controlled by the program.	• Family Status • Event • Phone Type
Code	Built-in Bode	An entry for a code type to uniquely identify records via that type.	Records can only have one code for a given type, although the user can define as many codes as they want for a given type.	• Spouse • Head of Household • Wednesday Meeting • Email • Mobile
Group Type	User-Defined Code Type	A type that collects related groups together to manage additional data about records.	The user can add as many groups as they like, although the records that support groups are controlled by the system.	• Giving Level • Committees • Hobbies
Group	User-Defined Code	An entry for a group.	The user can add as many groups to a type as they'd like.	• Gold • Finance • Property • Reading • Woodworking
Group Assignment	List Assignment	Links a record to a group.	Records can be assigned to as many groups under a type as the user wants. Using detailed tracking, a user can be assigned to a group multiple times where all but one assignments are historical.	n/a
User Field Set*	Other Information Set	A set of related detail types. Can be locked to turn all details types on or off and limit duplicates.	Loose sets are provided by the system. The user can add as many sets as they like, although the records that support user fields are controlled by the system.	• Background check • Ministry Interests • Rooming preferences
User Field*	Other Information Code	A type of detail that can be added to a record.	The user can add as many user field types as they want, either to a loose or user-created set. User field types match a specific data type—character, yes/no, raw data, etc. User fields, via their set, are defined for a specific	• Background check Date • Background check PDF • Top ministry

				record type.	desired • Snores
User Field*	Other Information	Additional data added to a record	For loose and unlocked sets, the user can add as many user fields as they want to a record, including multiples of the same type. For a locked set, either all the user fields in the set are available or none.	• December 2, 2015 • scan.pdf • YES

> ⚠ Items marked with an asterisk (*) can be renamed using the Terms system preference.

Master Coding System Window

The **Master Coding System** window has been completely overhauled to provide a more stable and modern experience.

Codes

Codes are organized by program. Only programs which can be accessed will appear

Click here to delete a code

Click a code to start editing it

(NEW) See when a code was entered and last modified

(NEW) See everywhere a code is in use

Use the sidebar to switch between window functions

Print a report of Master Coding System Data at any time

Click Add Code or click into the list and tab to a new line to add new codes

The Save button will light up when there are changes to be saved

Groups

Groups are organized by program. Only programs which can be accessed and that support groups will appear

Click here to delete a group

Select a group type then check here to enable detail tacking on that group

(Individual group only) Check here to enable taking attendance against this group type

Click Rename or double-click the group type to rename it

Click delete or select the group type and press the backspace or delete key to delete it

(NEW) See when a group was entered and last modified

(NEW) See everywhere a group is in use

Click here to add a new group type to the selected program

Click Add Group or click into the list and tab to a new line to add new groups

User Fields

User fields are organized by program. Only programs which can be accessed and which support user fields will appear

The loose set will always appear first

Check here to lock or unlock a set

Select a set and click Rename to rename it. Or double-click it in the set list. Note that Loose cannon the renamed

Select a set and click Delete to delete it and its types. Or select it in the set list and press the backspace or delete key. Loose cannot be deleted.

Change the User Field Type data here

(NEW) Move a user field to any other set within the same program include to and from loose

Click Add User Field Set to create a new set

Click Add User Field or click into the list and tab to a new line to add new user fields to the selected set

Integrity Checks

The backed system tracking codes, groups, and user fields has been completely overhauled. The database will now ensure only valid data is entered and when types or sets are updated or deleted, related records are updated accordingly. For the end user, this should not make a visible change. You may notice working with the Master Coding System is snappier and updating/deleting records has predictable results.

There is a significant amount of development in this area. Please report any issues working with codes, groups or details throughout the program as soon as possible.

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