

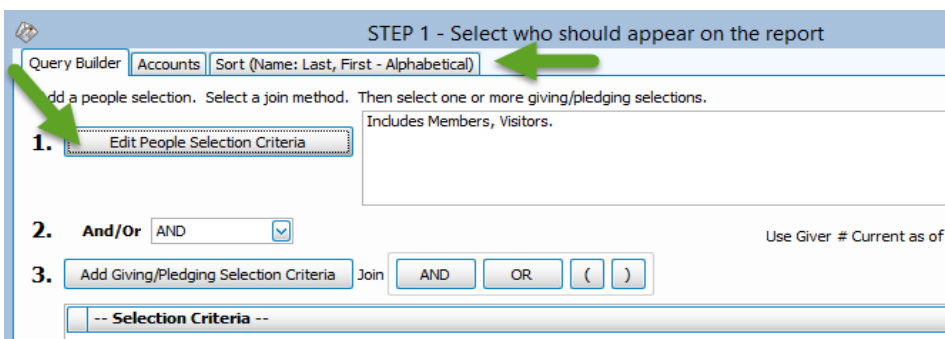
For use with RDP (Remote Desktop Protocol)
RDI (<https://cw.cloudrdi.com>)
Summit (RDP icon on local Desktop)
Kloud9 (RDP icon on local Desktop)

On your local computer, create a folder on your Local 'C' Drive and call it, *_CWExports* (Please note: You will create the *_CWExports* folder just once. Each time you export, use this same folder.)

Go to Membership>Reports>STEP 1 Select who should appear on the report

- On the *Query Builder* tab, Click **1. Edit People Selection Criteria**.

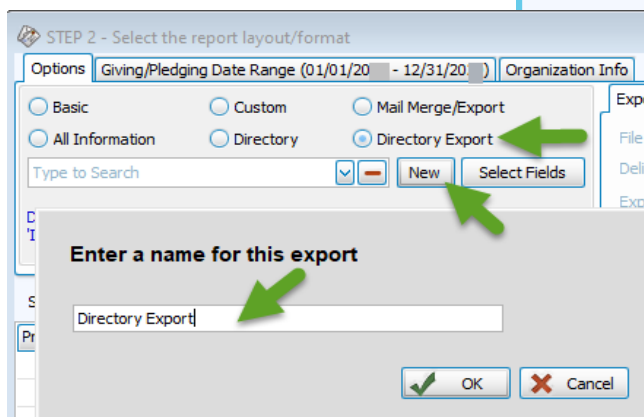
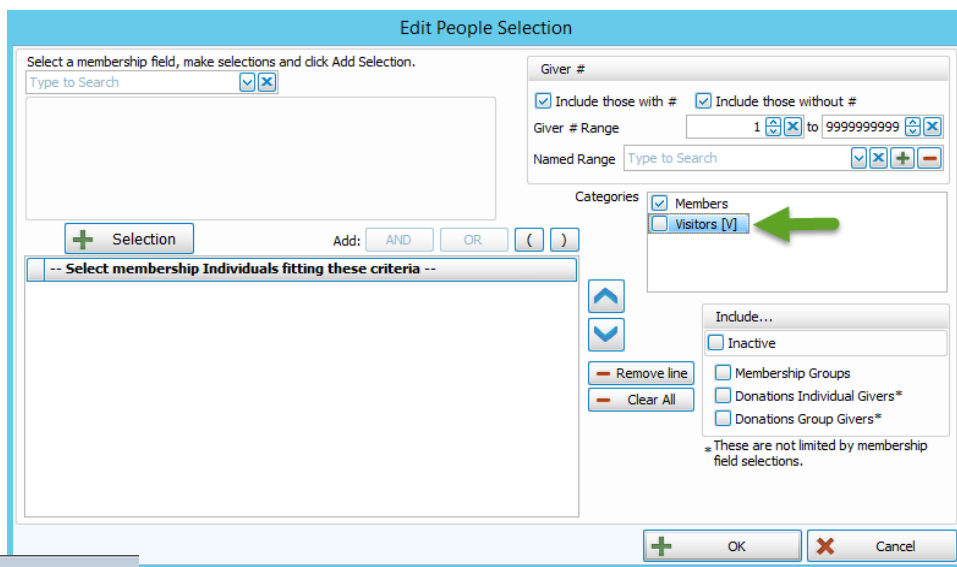
- On the *Sort* tab – Choose *Name, Last, First - Alphabetical*.



- On the *Edit People Selection* screen, *Visitors* will be included by default. If you do not want *Visitors* included, remove the checkmark.

- Click **OK**.

- Click **Next** on the *STEP 1* screen.



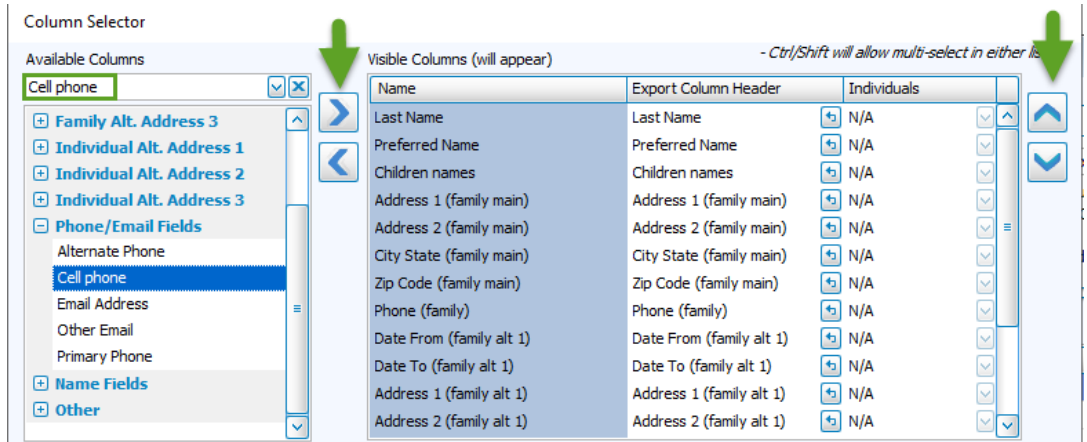
STEP 2 Select the report layout/format

Under *Options* in the top left, choose *Directory Export*.

- Next to the dropdown, click **New**.
- Enter a name for this export and click **OK**.

Please Note: By selecting *Directory* or *Directory Export*, the program will only pull those Individuals that have an *Include on Directory* checked and *Directory/Report Order* field filled in.

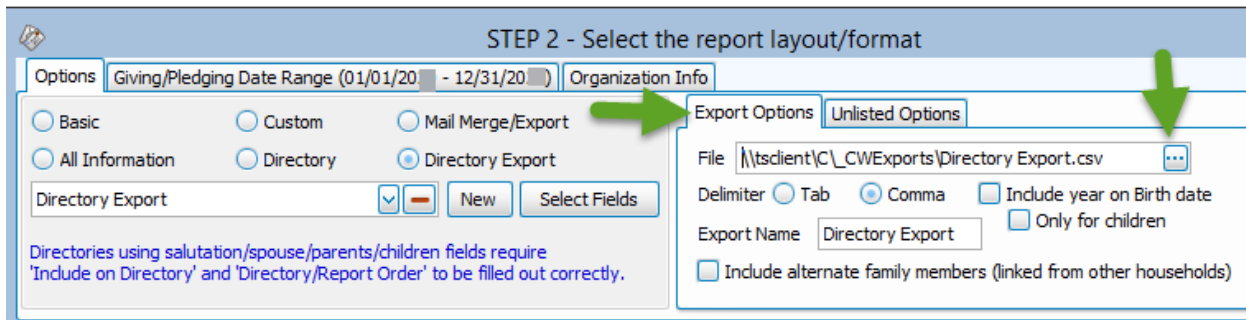
- The *Column Selector* appears.



On the *Column Selector*, review the *Visible Columns*. These are the fields that will be exported. Perhaps you may want to add the *Cell Phone* and/or *Email* fields to the *Directory Export*. To move fields to the *Visible Columns*, highlight the field on the left (*under Available Columns*) and click on the right-pointing arrow. Or to move fields from the *Visible Columns*, highlight the field on the right (*under Visible Columns*) and click the left-pointing arrow.

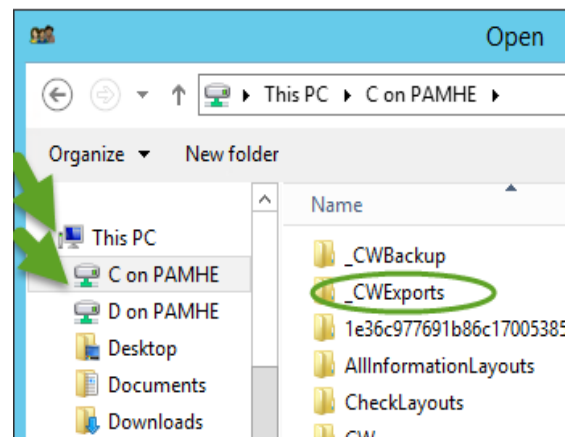
- To reorder the fields, highlight the field you wish to move and use the up and down arrow on the right.
- Click *OK*.

At the top right under *Export Options*, choose the location for your export by clicking the *Browser* button (...), which is located to the right of the *File* location.

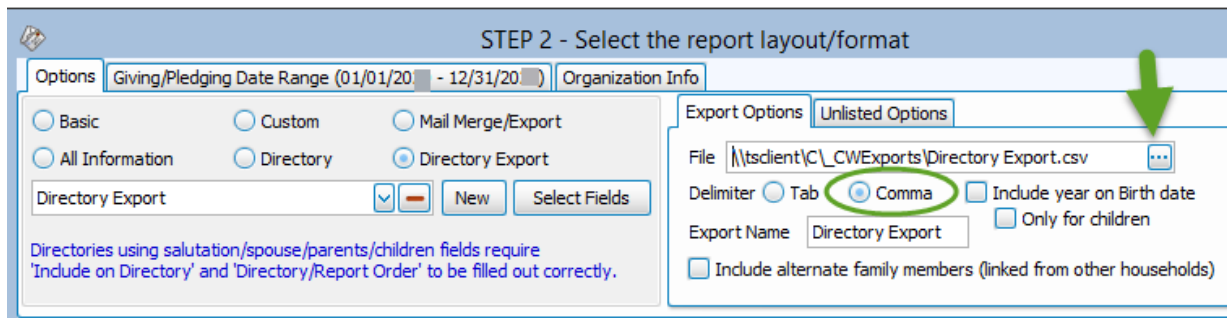


On the *Open* window, under *This PC*, choose *C Drive* on your computer name (i.e., *C on PAMHE*).

- Expand, then choose the *_CWExports* folder and click *Open*.



- Choose the Delimiter of *Comma*, which will create a .csv file (comma separated value) which can easily be opened in Excel.



STEP 2 - Select the report layout/format

Options Giving/Pledging Date Range (01/01/20 - 12/31/20) Organization Info

Basic Custom Mail Merge/Export

All Information Directory Directory Export

Directory Export [v] [] [New] [Select Fields]

Directories using salutation/spouse/parents/children fields require 'Include on Directory' and 'Directory/Report Order' to be filled out correctly.

Export Options Unlisted Options

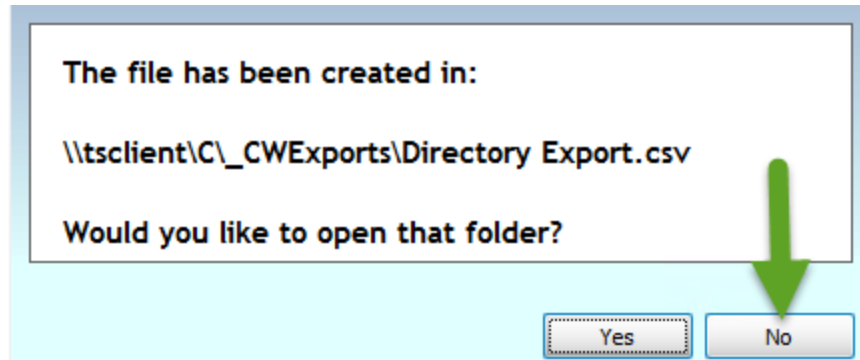
File \\tsclient\C_CWExports\Directory Export.csv [...]

Delimiter Tab Comma Include year on Birth date

Export Name Directory Export Only for children

Include alternate family members (linked from other households)

- Click *Export*
- A dialog box opens, informing you that a file has been created and asks if you wish to open the folder. Click *No*.



- Close or minimize Church Windows screens.

On your local computer, open your C Drive and go into the _CWExports folder to find your file.