

<u>Help Articles > Administrator Help > Officers > How to search and export the officers</u>

## How to search and export the officers

Omar S. - 2023-02-08 - Officers

You can search for your officers and export a list by using the steps below.

- 1. Click Settings or the Gear icon on the left menu.
- 2. In the Membership Management section, click Officer Search and Export.
- 3. The Officers page will display and the current officers will load. At the top of the page, you will have the following filters:
  - $\circ~$   $\mathbf{Term}$  The term the officer is in.
    - Custom Select Custom to enter a custom date range.
    - **Past** Displays a list of officers in prior years.
    - **Current** Displays the current list of officers.
    - Future Displays the list of upcoming officers.
  - **Positions** Select one or more positions to see the officers in the position. Learn more about <u>adding officer positions</u> and <u>assigning officers</u>.
- 4. Click the blue Update Results button to update the list based on the filters.
- 5. Click **Export** to download the list as a .csv spreadsheet file. The .csv file will includes:
  - $\circ~$  Name The officer's full name.
  - $\circ~\ensuremath{\textit{From}}$  When the officer started their position.
  - $\circ~$  To When the officer will end their position.
  - Email The officer's email address.
  - **Position** The officer's position.
- 6. You can also click the **dropdown arrow** to the right of the **Export** button and click **Custom Officer Export**.
  - The Custom Officer Export includes:
    - Officer Position The officer's position.

- **Prefix** The officer's prefix.
- First Name The officer's first name.
- Last Name The officer's last name.
- **Suffix** The officer's suffix.
- Officer Start Date The officer's position start date.
- Officer End Date The officer's position end date.
- Email The officer's email address.
- **Phone** The officer's phone number.
- Gender The officer's gender.
- Gender Self-Identification If the officer selected "Prefer to Self-Identify" as their gender, this column will display what they identity as.
- Address Information The officer's address.
- Member Directory Opt-in If the officer has opted into being displayed on the Member Directory.
- **Public Directory Opt-out** If the officer had opted into being displayed on the Public Directory.