

### Downloading Records

To download records to your specifications, including selected custom fields, the main steps are as follows:

1. Select desired search parameters on main search screen and click Go.
2. From the Search Results screen, customize the fields you wish to be included in the download, including both standard and custom fields (see detailed directions below). Be sure to Submit your choices when selecting the fields for download.
3. Click on Download Search or Download Mailing List (the latter will download mailing fields only).
4. Remove duplicates, if desired.
5. Save file to disk.

### Customizing Fields for Download

#### *Choosing standard fields:*

The system stores certain default values to determine which fields (including custom form responses) are included in a search or mailing list download. To customize the standard fields (e.g. address, phone) to be included in your download, click on "Customize download" button at the bottom of your search results screen. Select and/or deselect the fields that you want to include or exclude. Pressing the "Select all" button at the top of the pop-up screen will select all available fields for download. Clicking "Clear form" will clear the form. "Set default" will reset the download customization form to the original system defaults. Once you have customized the fields as desired, you must press the "Submit" button for your changes to take effect.

#### *Choosing custom fields:*

After submitting any changes to the basic fields (as described above), the system will ask if you wish to download additional information from Registration and Web Forms. To include fields from the custom form associated with your selected records (e.g. answers to survey questions), click Yes. From the FLEX form drop-down list choose the form from which you would like to include responses (you may only choose responses from one form per download). Select and deselect responses as desired and then press the Submit button. Note: you **MUST** press the submit button from this screen before proceeding for your FLEX response choices to take effect.

**Note:** When you customize your download preferences, your selection will be saved with your user profile so that the next time you access the system, your custom selections will be used as the default setting.