

How to Export College Redirection Pool Prospects from the CFNC CrossConnect System



To export College Redirection Pool prospects from the CFNC CrossConnect system there are three steps: Creating the export setting, creating the export project, and then running the export project. The first two steps only need to be done once. You will not need to redo these steps unless you would like to make changes to your setup. There is more detailed documentation available within the CrossConnect menu that goes into detail about how export settings and projects work within CrossConnect. You can access these documents by navigating to the “Help” menu at the top of the screen when you are logged into CrossConnect.

Sections covered:

[Export Setting Creation](#)

[Export Project Creation](#)

[Download Data](#)

Export Setting Creation

1. Navigate to Recruitment | Export Settings
2. Click on the “+New” button
3. Select “Flat File” as the Export Type
4. Enter a Name for this setting
5. Enter the File Name (This is what the file will be named if you download each prospect as an individual file)
6. Enter the Single File Name (This is what the file will be named if you download multiple prospects into a single file)
7. Enter the Separator (If you want the file to come through as a .xls leave this blank and selection “Use Tab Separator”)
8. Select the options you would like to have applied (details on these options can be found in the Recruitment documentation)
9. Navigate to the Fields tab
10. For the “**Show Fields For**” selection choose “**CRP**”
11. Select the fields you would like to download
 - a. There are two sets of fields. The first are the “Standard Fields” and these fields are pulled from the student’s CFNC profile. The second are the “Dynamic Fields” and these are the fields that come from the CRP form a student fills out to indicate their interest in the CRP program.
 - b. The names of the fields should be fairly self-explanatory. If you have any questions about a specific field please let me know
 - c. If you would like to download all of the information available you can select the checkbox to the left of “Standard Fields” and “Dynamic Fields” and all of the fields for those two sections will be included
12. Click on the “Add Fields” button
13. Click on the “Save” button
14. You can now run a test export to make sure you have all of the fields you need and they are coming through correctly

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Export Project Creation

1. Navigate to Recruitment | Export Projects
2. Click on the “+New” button
3. Enter a Name for this project
4. In the **Source** dropdown select “CRP”
5. Enter the File Name you would like
6. Enter the Folder Name you would like
7. Select the option of “Combine Export Setting Into One File”
8. Click on the “+Add Settings” button on the right side of the screen
9. Select the export setting you created in the steps before this
10. Click “Save”

Download Data

1. Navigate to Recruitment | Export Projects
2. Click on the green export icon to the left of the export project you created
3. Click on the “Export” button
4. Click on “Download Export File”