

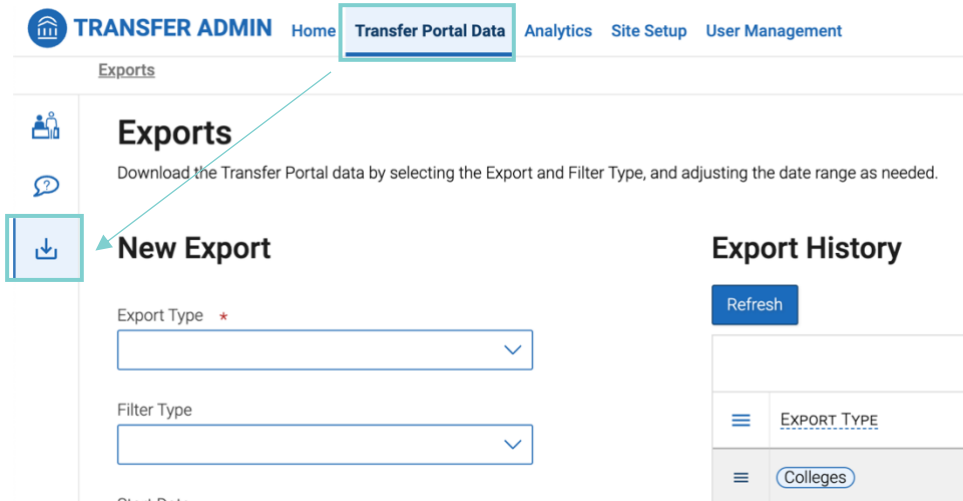
## Exports

### What are Exports?

Transfer Portal allows partners to export student data from the site. Only partner administrators with permissions to view Transfer Portal Data can export data from Transfer Portal.

### Feature Overview

The Exports feature is available to Transfer Portal administrations with permissions to view Transfer Portal Student Data. To enter the Exports center, click on the blue Exports link on the sidebar within the Transfer Portal Data tab after logging into Transfer Portal with staff credentials.



### Export Types

There are seven (7) discrete exports with variable data included, named below:

- Prospective Students
- Courses
- Pending Courses
- Colleges
- Majors
- Other Credits
- Resolved Pending Courses

Transfer Portal has a standardized data export structure, which follow these key requirements:

1. Each export includes a unique Transfer Portal assigned Student ID in Column A, student\_id.
2. All null values are empty in export files.
3. All column headers are lower case without spaces.
4. Only students who have created a profile are included in exports.
5. Each export will follow the naming convention: EXPORT\_TYPE\_mm\_dd\_yyyy (example: PROSPECTIVE\_STUDENTS\_07\_13\_2021)
6. You may choose to export each file based on one of three criteria:
  - All Transfer Portal student records, regardless of the filter type (Last Login Date Range or Profile Creation Date Range)
  - Transfer Portal student records in a certain time frame, based on when the student created their profile OR when the student last logged in

## How to Export Files

1. Log into Transfer Portal using your staff credentials in either Chrome or Firefox.
2. Navigate to the Transfer Portal Data tab in the top of your screen
  - If you do not see this tab, contact your Program Owner to confirm you *should* have access to Exports. If you do, your Program Owner can assist you in elevating your permissions with EAB.
3. Select the Export Type, out of the seven (7) options below:
  - Prospective Students (default, most popular)
  - Courses
  - Pending Courses
  - Colleges
  - Majors
  - Other Credits
  - Resolved Pending Courses
4. Select your Filter Type, out of the two options below. Please note: if you are not going to update the date ranges in the next step, there is no need to select a Filter Type because you will export all Transfer Portal records either way.
  - Profile Creation Date Range (default, most popular)
  - Last Login Date Range
5. Change the date range for the Transfer Portal records in question, if applicable. Examples below:
  - You want all Transfer Portal records for a certain Export Type, regardless of date – do not a Start Date or End Date
  - You want to export Transfer Portal records for a certain Export Type before April 2, 2021 – set End Date to 04/02/2021
  - You want to export Transfer Portal records for a certain Export Type after April 2, 2021 – set Start Date to 04/02/2021
6. Once satisfied with criteria set for your export, click the blue Submit button under End Date.
  - Your record will automatically populate in the Export History section of your screen with status “Queued”.
7. Click “Refresh” button and confirm your latest Export History record Status says “Success”.
8. Click the “Download” button next to your record to view the CSV file export.