MARQUIS

| CNX611 | ExportPro |
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| | ExportPro is designed to give the ability to automate the creation of files for specific records with the ease of one click. |
| **Order of Steps** | **Tasks** |
| **Step 1** | Log into **Marquis Next** |
| **Step 2** | Click the ☰ and click on **CenTrax** |
| | The active **Institution** and **File** will display in the upper right-hand section to the left of the name of the user logged in. |
| **Step 3** | Click **Data Processing** |
| **Step 4** | Click **ExportPro** |
| **Step 5** | To create a new ExportPro, click the green **Add New** button |
| **Step 6** | Type a description into the **Name** box |
| **Step 7** | Click the drop-down arrow for **Field Definition** to select a Field Group |
| **Step 8** | Select a saved filter, if desired (optional) |
| | • Click the drop-down arrow under **Group** to select the filter group |
| | • Click the drop-down arrow under **Filter** to select a filter within the filter group |
| **Step 9** | Click the drop-down arrow under Format to select the file type |
| | • Comma-delimited |
| | • Excel |
| | • Fixed-length |
| | • Pipe-delimited |
| | • Tab-delimited |
| **Step 10** | Type a **File name** into the File Name box |
| **Step 11** | Click **Save** |
| **Step 12** | To **Run** the ExportPro, place a check mark next to the desired ExportPro items in the list |
| 12.1 | With the export items selected, click the **Run Now** button |
| 12.2 | When the windows explorer pops up, choose a destination to place the file and click **Save** |
| **Step 13** | To **Edit** an ExportPro setup, click on the export item within the list |
| 13.1 | Make the desired changes |
| 13.2 | Click the **Save** button at the bottom of the page |
| **Step 14** | To **Delete** an ExportPro item, place a check mark next the desired ExportPro items in the list |
| 14.1 | Click the **Delete** button in the upper left hand corner |
| 14.2 | Click **Yes** in the confirmation message |
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