Getting Set Up for Success

An Introduction to Your Role

Getting Set Up for Success: An Introduction to Your Role

The following is a list of learning objectives for this guide

1 **Introduce Responsibilities**
Understand the responsibilities of an Application Administrator (also known as an "App Admin")

2 **Understand the Commitment**
Understand the time commitment required of an App Admin, both within the launch process & after implementation

3 **Identify your App Admin**
Identify who from your Functional Team will serve in the App Admin role

4 **Learn about Support Resources**
Understand what support resources are available to you as App Admin, including live and on demand offerings.

We hope this introduction helps you gain a better understanding of the App Admin role. Best of luck as you dive into your new role!

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Part 1: Role Overview

An App Admin's responsibilities may include many different tasks but will always include the responsibilities below:

Serves as the **Transfer Portal expert** and main point of contact across campus. All questions about the Transfer Portal ultimately route through the App Admin

Understands the "why" behind different **configurations** in the Transfer Portal, documents that reasoning, and can effectively communicate it to others

Organizes and/or provides **training** and **onboarding** for users

Owns **user activation**, roles, permissions, and configurations

Triages end user issues to the appropriate experts, focusing on the user experience while working with the technical team to incorporate appropriate data

Understands and **advises** on the overall student support structure on campus, basic technical knowledge, and larger **rollout strategy**

Creates and maintains a **support structure** so users understand how best to get answers to questions and submit ideas

Understands how information is captured and represented in the Transfer Portal and can explain that **data** to others

Part 2: Evolving Responsibilities

As an App Admin, you will have different responsibilities during and after your Transfer Portal implementation.

Responsibilities During Implementation

App Admin

Responsibilities Post-Implementation

Initial Site Setup/Site configurations:

- Designate user roles and permissions
- Configure checklist items for prospective students using the Transfer Portal
- Establish site language including various site headers and other customizable text
- Add resources and categories to provide extra information relevant to transfer students

Ongoing Support:

- Maintain user access, roles, and permissions
- Modify any site-wide configurations
- Collect issue reports and enhancement requests
- Continue to work with EAB Team on necessary tasks such as supporting and onboarding additional Transfer Portal users
- Use reporting features and other tools to provide data on the effectiveness of the Transfer Portal
- Complete reoccurring processes like annual program review

How much time will you need to devote to your role?

Seeing all the important responsibilities of an App Admin, you are likely wondering how much time you will need to devote to your role. The percentage of total work time that an App Admin can devote to their Transfer Portal responsibilities will vary based on the App Admin's other roles and responsibilities as well as their institution's size, type, and delegation of responsibilities.

Your role will likely require the most hours toward the beginning of the implementation process (~1-4 hours per week).

Post-implementation, time commitments will vary based on utilization and questions/issues from end-users. You may experience a higher time commitment as phased roll outs are implemented across campus or when new functionality is being introduced.

Part 3: Support Resources

EAB has a wide variety of resources available to support App Admins.

On-Demand Resources	Live Offerings from EAB	Site-Specific Resources
The Knowledge Center: The knowledge center is your go-to destination for quick help resources related to the Transfer Portal. It can be accessed through your Portal, and contains help articles as well as how-to guides and release notes. –accessed through the question mark icon in the portal **EAB.com:** Access recorded webinars and other strategic materials.	**Office Hours:** These virtual sessions are a time for you to join product experts from the EAB Partner Support Team and your fellow App Admins to talk through platform questions and hear from your peers. **Transfer Intensive Limited Series:** These webinars will focus on different strategic aspects of utilizing the Transfer Portal.	**PST**: Reach out to the Partner Support Team with questions, site issues, or configuration updates. Their email address is: TransferTechSupport@eab.com

Email TransferTechSupport@eab.com the name(s) & email(s) of your App Admins

This contact information will be used to:

• Communicate about platform releases

• Send invitations to live webinars

• Distribute other resources

• Designate in-app tips