



EAB

Transfer Portal Support Office Hours

Wednesday, March 2nd

Summary of the Portal Planner



Used in Setting Up & Maintaining Your Transfer Portal

Includes making configuration decisions, data decisions, and other strategic decisions.



A Reference Point for Your Institution & EAB

A shared reference guide in understanding what transfer portal decisions were made and a go-to reference to make new decisions



Next Steps:

Your Strategic Leader will work with you on completing your Transfer Portal Planner across March & April.

Using Your Box Folder



Name	Updated ▾	Size	⌵ ▶
 Value Stream	Jun 3, 2021 by Allison Akalonu	5 Files	
 Implementation	Jan 13, 2021 by Gautam Sudhakar	130 Files	
 Transfer Portal Planner.docx V2	Today by Gina Schorr	308.8 KB	
 Peoplesoft Program Load Template.xlsx	Today by Gina Schorr	10.6 KB	
 EAB's Recurring Support_Transfer Portal.pdf	Jul 29, 2020 by Haley Patrick	260.3 KB	

Questions about Box access? Please reach out to us at TransferTechSupport@EAB.com



TRANSFER PORTAL

Transfer Portal Planner

Purpose: The Transfer Portal Planner is intended to capture Portal strategy and configurations for the partner institution and EAB team to reference for initial implementation and ongoing support.

Institution Name: Click or tap here to enter text.

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Planning

- [Leadership Team & Functional Roles](#)
- [User Permissions](#)
- [Market Launch, Technical Readiness, & Optimization](#)
- [Promotion & Communication Plan](#)

Workflow

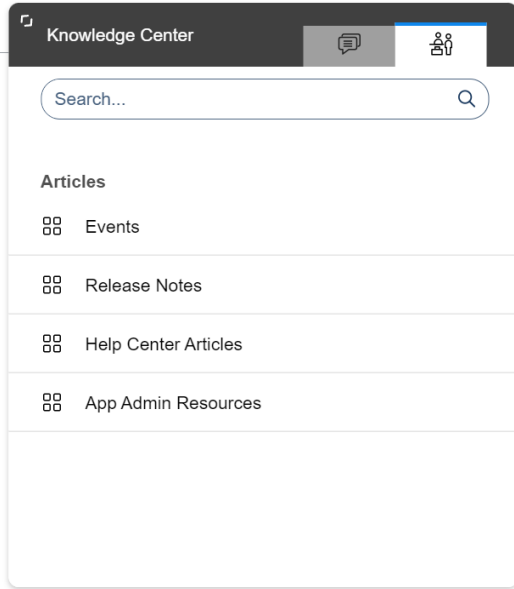
- [Workflow: Pending Course Review](#)
- [Workflow: Lead Management](#)

Site Setup

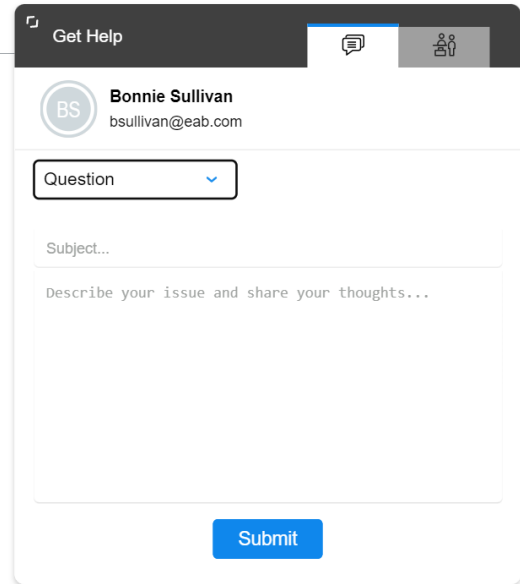
- [Terms](#)
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- [Checklist and Campus Resources](#)

A New Way to Submit Tickets!

Ticket submission directly through your Transfer Portal



The screenshot shows the 'Knowledge Center' interface. At the top, there is a dark header with the text 'Knowledge Center' on the left and two icons (a speech bubble and a group of people) on the right. Below the header is a search bar with the placeholder text 'Search...' and a magnifying glass icon. Underneath the search bar, the word 'Articles' is displayed. Below 'Articles', there is a list of four items, each with a grid icon to its left: 'Events', 'Release Notes', 'Help Center Articles', and 'App Admin Resources'. The bottom of the interface is a white space.



The screenshot shows the 'Get Help' interface. At the top, there is a dark header with the text 'Get Help' on the left and two icons (a speech bubble and a group of people) on the right. Below the header, there is a circular profile picture with the initials 'BS' and the name 'Bonnie Sullivan' with the email address 'bsullivan@eab.com' below it. Underneath the profile information, there is a dropdown menu with the text 'Question' and a downward arrow. Below the dropdown menu, there is a text input field with the placeholder text 'Subject...'. Below the 'Subject...' field, there is a larger text input field with the placeholder text 'Describe your issue and share your thoughts...'. At the bottom of the interface, there is a blue button with the text 'Submit'.

Questions?



**We are here! Let us know if
you have joined with a
question!**