



EAB

# Transfer Portal Support Office Hours

Wednesday, April 6<sup>th</sup>

# Connecting to Audio



Refer to the meeting confirmation email you received in your inbox.

## Using Your Computer Speakers

If you select the “Computer Audio” option, please be sure that your speakers or headphones are connected.

## Using Your Telephone

If you select the “Phone Call” option, please dial in with the phone number and meeting ID provided.

Date Time: Mar 31, 2020 03:00 PM Eastern Time (US and Canada)

Join from PC, Mac, Linux, iOS or Android: [Click Here to Join](#)

Note: This link should not be shared with others; it is unique to you.

[Add to Calendar](#) [Add to Google Calendar](#) [Add to Yahoo Calendar](#)

Or iPhone one-tap

US: +16468769923,,511418667# or +13126266799,,511418667#

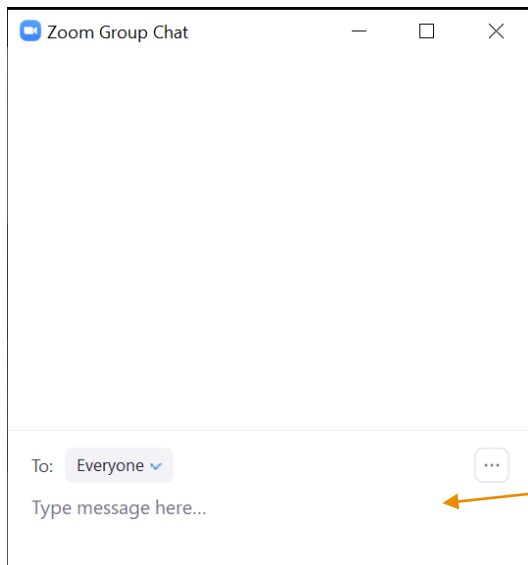
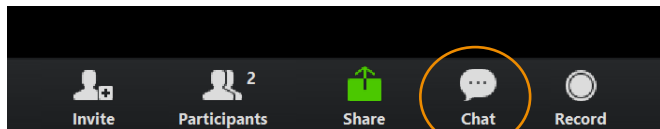
Or Telephone:

Dial(for higher quality, dial a number based on your current location):

US: +1 646 876 9923 or +1 312 626 6799 or +1 301 715 8592 or +1 346 248 7799 or +1 669 900 6833 or +1 253 215 8782

Meeting ID: 511 418 667

International numbers available: <https://eab.zoom.us/j/abLkP09Nci>



## Asking a Question

To ask a question, navigate to the chat button at the bottom of your screen and type it into the chat panel, or unmute yourself and ask your question verbally.

After the session, a member of our team will be in touch to follow-up on your questions individually if they were not answered during the session.

*Type your question here*

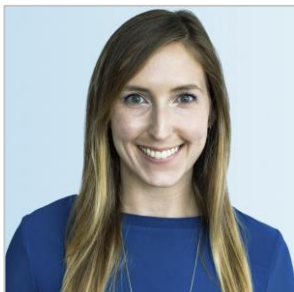
# Update your name (and include your institution)

## Update Your Name

- Click **Participants** in your menu bar.
- On the right side of the screen, hover over your name, click more, and then click **Rename**.
- Add a dash and your institution name. You may also add your pronouns if you wish (example: they/them/theirs)

The image shows a Zoom meeting interface. The main window displays a slide with the EAB logo and the text "EAB Virtual Meetings 2020". On the right side, the "Participants (2)" panel is open, showing "Test Participant (Me)" and "Meeting Host (Host)". The "Test Participant (Me)" name is highlighted, and a "Rename" button is visible. Below the main window, the Zoom control bar is shown, with the "Participants" icon highlighted. A "Rename" dialog box is open in the foreground, with the text "Enter a new screen name:" and a text input field containing "Jane Doe- They/Them/Theirs- Institution". The dialog box has "OK" and "Cancel" buttons.

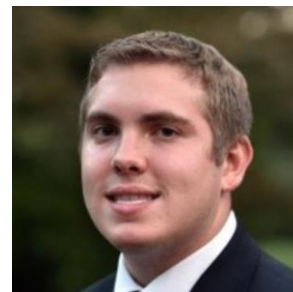
# Today's Presenters



**Allison Akalonu**  
*Transfer Portal*



**Gina Schorr**  
*Partner Support*



**Brent Rice**  
*Partner Support*

# Summary of Application Administrator Role

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## Setting Up & Maintaining Your Transfer Portal

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



## Connecting the Dots for Other Users

Includes answering questions from other users on campus, training new users, and triaging tickets to our EAB support teams.



## Next Steps:

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



Access App Admin Role Office Hours recording: [On-Demand Resource](#)

# Portal Planner Overview

Access in your shared EAB Box folder



The screenshot shows the EAB logo at the top left. Below it is a blue button labeled "TRANSFER PORTAL". The main heading is "Transfer Portal Planner". Underneath, there is a "Purpose" section stating the tool is for capturing strategy and configurations. Below that is a text input field for "Institution Name" with a placeholder "Click or tap here to enter text." The bottom of the page features a decorative blue and teal geometric pattern.

## Table of Contents

### 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](#)
- [Programs, Major Descriptions, and Degree Audit](#)
- [Checklist and Campus Resources](#)



Access Transfer Portal Planner Office Hours recording: [On-Demand Resource](#)

# Transfer Portal Quick Start Guide

## Live Demo Training

 Transfer Portal

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### Transfer Portal – Quick Start Guide

#### Getting Started

#### Portal Access

- o Create a student profile in your Transfer Portal. Transfer URL: [xxx.transfer.decees](#)
- o Email EAB's Partner Support Team at [TransferTechSupport@eab.com](mailto:TransferTechSupport@eab.com) to request your student profile be upgraded to a staff profile.
- o Log back into your Transfer Portal for staff access.

#### Site Setup

- o Transfer Portal Site Setup Training: [Site Setup Training](#)
- o Access your institutions Transfer Portal Planner for specific site configurations and decisions. The Transfer Portal Planner is stored in your **shared EAB Box Folder**.
  - If you need assistance accessing this, email [TransferTechSupport@eab.com](mailto:TransferTechSupport@eab.com)

#### Student Facing

Learn how a student interacts with the Transfer Portal: [Transfer Portal Demo](#)

- o What happens if a student enters a course that we don't have an equivalency set up for?
  - Learn the Pending Course Workflow: [Pending Course Workflow Demo](#)
- o How can I adjust the content a student sees?
  - Transfer Portal Content Management: [Transfer Portal Content Management Webinar](#)

#### Staff Facing

- o Understand Lead Management Workflow using the Transfer Portal exports: [Lead Management Workflow](#)
- o Knowledge Center & Support Access through the Portal Get Help "?" icon.
  - Help center articles
  - Live program registration
  - On-demand program access
  - Submit a support question



# App Admin Onboarding Program

## Live and On-Demand Resources



Module 1: Intro to Transfer Portal

**Live Onboarding Deep Dive**

**Date: TBD**

- Module Highlights
- Question & Answer
- Live Walkthroughs



Feature Training Videos



Module 2: Site Maintenance & Support



Module 3: Pending Course Workflow



Module 4: Lead Management Workflow

# Questions?



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

# Polls

- 1 How was today's session?
- 2 Would you like to be registered for the May 4<sup>th</sup> Office Hours session?

