Transfer Portal Support Office Hours

Wednesday, May 4th

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
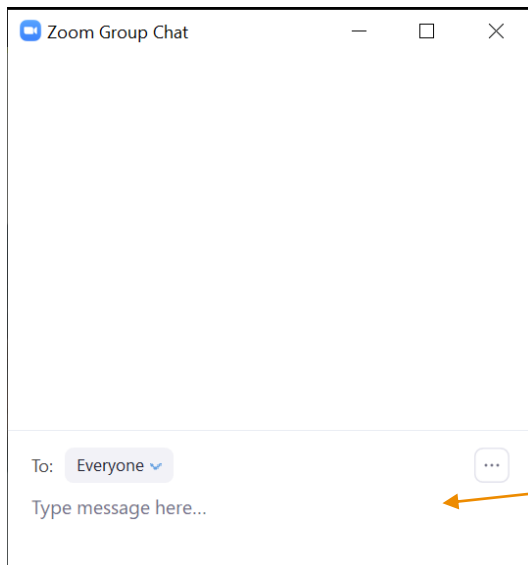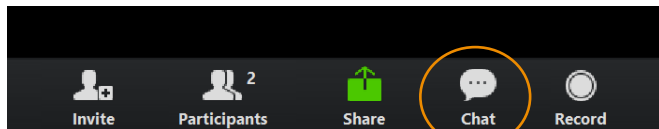   US: +16468769923,,511418667# or +13126266799,,511418667#
Or Telephone:
    Dial(for higher quality, dial a number based on your current location):
        US: +1 646 876 9923 or +1 312 626 6799 or +1 301 715 8592 or +1 346 248 7799 or +1 669 900 6833 or +1 253 215 8782
    Meeting ID: 511 418 667
    International numbers available: https://eab.zoom.us/u/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)

Allison Akalonu
Transfer Portal

Kanaka Naidu
Data Integration Services

Gina Schorr
Partner Support

1. Current Workflow: Lead Management

2. New Transfer Portal Data Export Automation Process

3. Partner vs. EAB Responsibilities

4. Initiating Transfer Portal Automation

5. Wrap up and Next Steps

Current Lead Management & Communication Steps

1 **Transfer Portal Data Export**

- Partner determines who owns the process, frequency of exports, filter type, filter dates and **manually** exports the data from the Transfer Portal

2 **CRM Record Creation**

- Partner defines the process for importing the Portal data, de-duplication of records, and assigning correct CRM attribute

3 **Follow up and Communication**

- Partner follows up with students and determines if follow up is automated or manual, who is responsible for follow up, and type of communication

Process Improvement:
Automate Transfer Portal Data Exports

New Lead Management & Communication Steps

Purpose: To automate the delivery of Transfer Poral export files to partners and eliminate manual labor from the lead management workflow process

1

Automatic Transfer Portal Exports

- Data is **automatically** exported from the Transfer Portal into a partner owned server (SFTP)

2

Partner Collects Exports

- Partner picks up the automated exports from the SFTP server

New Process:
Eliminates Manual Exports

Saves staff time

Improves speed to lead

3

CRM Record Creation

- Partner defines the process for importing the Portal data, de-duplication of records, and assigning correct CRM attribute

4

Follow up and Communication

- Partner follows up with students and determines if follow up is automated or manual, who is responsible for follow up, and type of communication

Partner Steps to Data Automation

1 SFTP Server Setup
- Partner sets up SFTP Server

2 Determine Connection
- Partner determines if connection will be configured using Type 1: Password or Type 2: Public/Private Key

3 Configuration Details
- Partner provides EAB with information needed to configure a connection to the SFTP Server
- Hostname, username, password, base target path, and filter type

4 Schedule Exports Frequency
- Partner will notify EAB with frequency of exports including the timing and filter type

5 EAB Sets Up Automation & Delivers Exports

Coming Soon: Detailed Documentation of Steps in Box

Partner App Admin

Email PST at
TransferTechSupport@eab.com
or submit a ticket through the
Transfer Portal Help Center

Partner App Admin

Decide configuration set
up and complete the
data gathering
document. Reply to PST
when complete.

EAB

PST to migrate data
gathering document into
Partner's Transfer Portal
Planner.

1

2

3

4

5

EAB

Provide partner App
Admin with secure Box
link to complete their
data gathering
document.

EAB

PST to connect the
Partner with Data
Integration Services
(DIS) to complete the
technical set up.

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 June 1st Office Hours session?