Transfer Portal Support
Office Hours

Wednesday, June 1st

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
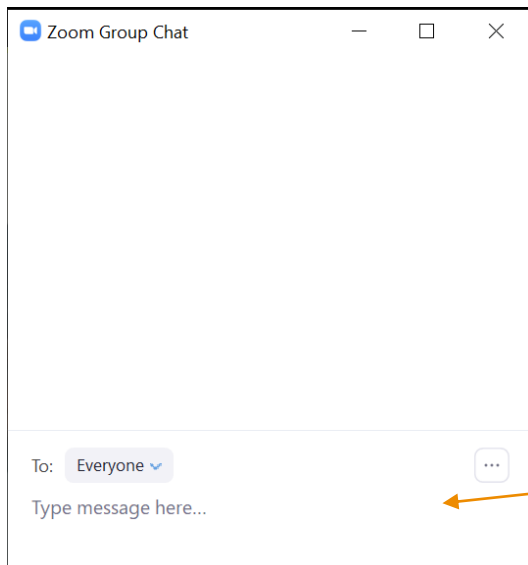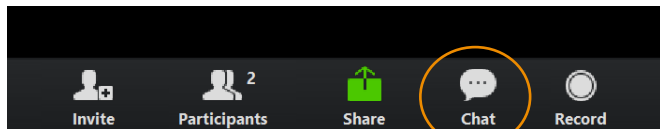   US: +16468769923,,511418667# or +13126266799,,511418667#
Or Telephone:
    Dial(for higher quality, dial a number based on your current location):
        US: +1 646 876 9923 or +1 312 626 6799 or +1 301 715 8592 or +1 346 248 7799 or +1 669 900 6833 or +1 253 215 8782
    Meeting ID: 511 418 667
    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.
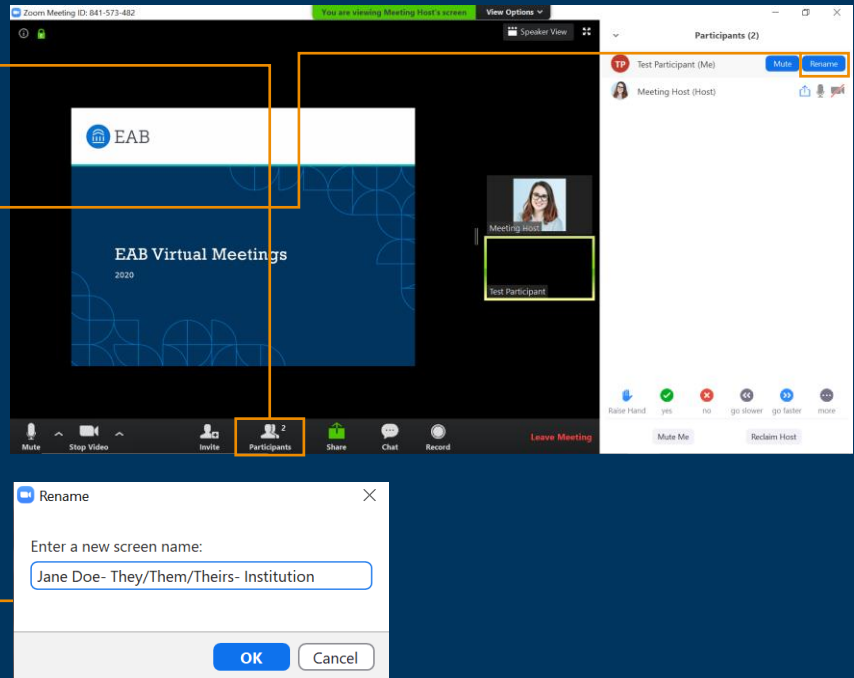
After the session, a member of our team will be in touch to follow-up on your questions individually if they were not answered during the session.

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)
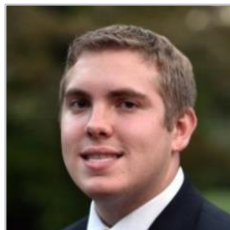
Gina Schorr
Partner Support

Kate Manning
Transfer Portal

Brent Rice
Partner Support

Allison Akalonu
Transfer Portal

Content Management Summary

Below is a summary of the critical portal content that should remain up to date and the owners involved in the process. More details about the content decisions and owners for your institution are captured in the following section of the Portal Planner.

Step-by-step directions on how to update your site setup content can be found through this link in the Site Setup Guide. EAB recommends that you review and update the content at least once a year before the academic year (typically between May-July).

The typical owners involved in each piece of content are indicated below. If more than one owner is required for the content, work through the changes in the following order:

1. **App Admin** – the Application Administrator can make these adjustments directly in the Transfer Portal Site Setup.
2. **Partner SIS** – the Application Administrator needs to work with your institution's business process owner to make the content adjustments in your SIS. The changes will then be displayed in the Transfer Portal following the next data feed.
3. **EAB Partner Support Team (PST)** - the Application Administrator to email TransferTechSupport@eab.com with desired changes for the content.

Content Management		Owner(s)		
Portal Content	Updates to Consider	App Admin	Partner SIS	EAB PST
College Name Change	Review and confirm all college names	X		X
College Display On/Off	Review colleges not displayed and consider any changes	X		X
Non-transferable Colleges	Confirm accuracy of non-transferable colleges list	X		X
Terms	Extend out to new terms and update dates	X	X	
New Program/Major	Identify and upload any new programs offered	X	X	X
Degree Audit Catalog- New Catalog Year	Provide EAB with the new degree audit catalog year	X		X
Checklist	Review all checklist items for accuracy, order, and details	X		
Campus Resources	Update/remove any outdated resources. Add any new available resources	X		
Customized Messages	Review custom messages to confirm they are current	X		
Changing Program/Major Display Name	Confirm current program names display correctly	X		
Updating the Program/Major short description & About the Major text	Read the hover (i) and About the Major text for each / program for updates	X		

EAB

Transfer Portal Site Setup Guide

Demonstrated with EAB's Sandbox Environment for the fictional Woodley University

Updated November 2021

- Located in your Transfer Portal Planner
- Access through your EAB.com Box folder

- Site Set up Guide
- App Admin Resources on eab.com: https://eab.com/wp-content/uploads/2022/04/PDF-Transfer-Portal-Site-Setup-Guide.pdf

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 July 13th Office Hours session?