Transfer Portal Support Office Hours

Wednesday, June 7th

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
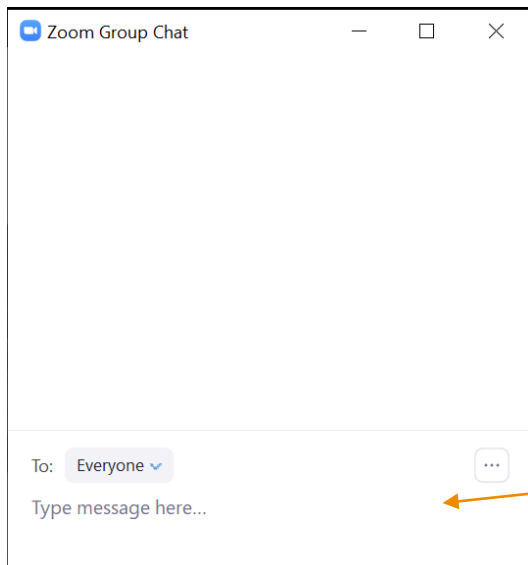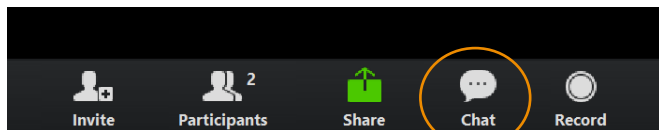   US: +16468769923,,511418667# or +13126266799,,511418667#
Or Telephone:
   Dial(for higher quality, dial a number based on your current location):
      US: +1 646 876 9923 or +1 312 626 6799 or +1 301 715 8592 or +1 346 248 7799 or +1 669 900 6833 or +1 253 215 8792
   Meeting ID: 511 418 667
   International numbers available: https://eab.zoom.us/u/abLkP09Nci

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Using Zoom

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

Allison Akalonu
Transfer Portal

Gina Schorr
Partner Support

Ashleigh Murray
Partner Support

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		

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 (template version)

- 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

New Program Requirements

- Review the current list of programs loaded into Transfer Portal.
- Identify programs that are no longer offered for incoming students, are new to the institution (i.e., missing from portal), or have experienced any SIS code changes (i.e., program the same, but codes in portal incorrect).
- Ensure all programs loaded into portal have final degree requirements built in production for your catalog year configuration.

Email EAB PST to Update

- Provide EAB Partner Support Team with the Program Upload template for your SIS found here on the [Transfer Resource Hub](#).
- Only include new programs or those with new SIS codes.
- Complete the necessary fields for upload.

Program Display

- Turn off any programs no longer offered to incoming students.
- Review the program display names for accuracy. Adjust directly in the Transfer Portal.
- Add new and review existing program descriptions. Adjust directly in the Transfer Portal.

Catalog year needs to be updated with EAB annually!

Catalog Year Update

- Email EAB Partner Support Team (Transfertechsupport@eab.com) with your most recent catalog year.
- Format is based on SIS

Catalog Year Format by SIS

➢ **DegreeWorks:** When new catalog is finalized and in production, partner to confirm period_start field value for latest degree requirement in dap_req_block table in DW

➢ **Colleague:** When new catalog is finalized and in production, partner to confirm latest catalog year.

➢ **PeopleSoft:** When new requirement terms are finalized and in production, partner to confirm the latest effective date used in any requirement term.

EAB uses the requirement term to dictate what rows of specific program requirement groups, requirement, course lists, etc. to pull into the degree audit process.

Example:

– There is an academic career requirement group called "General Education Requirements" and

– This requirement group has two effective dated rows: 01/01/2020 and 01/01/2023

If EAB uses "Fall 2023" as the prospective student's requirement term, then the degree audit process will pull in the requirement group row with the effective date of 01/01/2023

Audit individuals and permissions

Export Staff Users

- Directly from User Management screen in Transfer Portal, export Staff Users
- Identify any users to remove or permissions to adjust
  - Filter based on permission type

Adjust Directly in Transfer Portal

- On the Staff Users page, click into individuals to remove completely or adjust permissions

Permission Glossary

➢ **Student Data Access** – view and interact with student submitted Transfer Portal data, including pending courses to review

➢ **Site Setup Access** – ability to adjust program display, custom messages, campus resources, checklists, etc.

➢ **Analytics Access** – view and download Transfer Portal utilization data

➢ **User Management Access** – the ability to add, remove, or adjust staff permissions

Review each section for accuracy

Terms and College Display

- **College Display** - review visibility and details. Export from Transfer Portal available for review audit!
- **Terms** - extend out to new terms in your SIS and update visibility directly in Transfer Portal

Student Facing Information

- Customized Messages
- Campus Resources
- Checklist Items

Resources

- Help Center Articles in Transfer Portal
- 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

Transfer Portal Partner References

Annual Reference review process will occur each Summer via email to each Transfer Portal Partner.

Serving as a reference is an opportunity for you to share your experiences with a prospective partner and assist in answering any questions they may have.

Polls

1 How was today's session?

2 How would you rate the value of the Transfer Portal Office Hours Program overall?

2 What topics would you like to see covered across the next Office Hours series??

Questions?

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