



EAB

Transfer Portal Support Office Hours

Wednesday, July 13th

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#

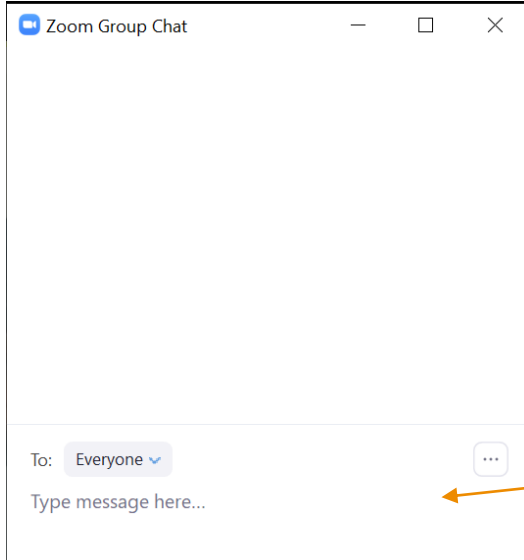
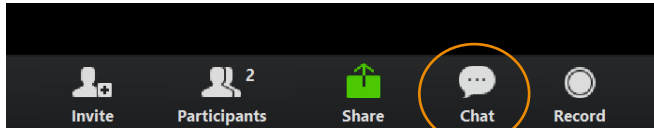
Or Telephone:

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". A small video thumbnail of a participant is visible. The bottom toolbar includes icons for Mute, Stop Video, Invite, Participants, Share, Chat, and Record. The "Participants" icon is highlighted with an orange box. On the right side, the "Participants (2)" list shows "Test Participant (Me)" and "Meeting Host (Host)". The "Test Participant (Me)" name is highlighted with an orange box, and a "Rename" button is visible next to it. Below the main window, a "Rename" dialog box is open, showing 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 at the bottom.

Today's Presenters



Gina Schorr
Partner Support



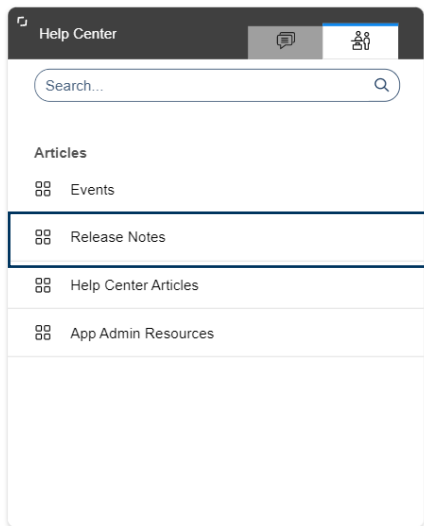
Brent Rice
Partner Support



Stephen Brown
Partner Support

Transfer Analytics Release

Minor Adjustments to Analytics Dashboards



Highlights

- **New:** Pipeline Details
 - *Pending Courses by Transfer College Report*
- **Enhanced:** Data refresh time clarification
- **Removed:**
 - Utilization Summary - *# Majors Selected*
 - Pipeline Details – *Average Schools per User and Average Majors per User*

Content Management & Onboarding Resources

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 Teams (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 App Admin Resources

EAB has created trainings for our Transfer Portal technology. These resources will help our App Admins get up to speed on Transfer Portal, understand site maintenance, and manage course and lead management workflows. Explore the guides, demos, and sample materials in each of the training modules below.

- + **Module 1: Intro to Transfer Portal**
- + **Module 2: Site Maintenance and Support**
- + **Module 3: Pending Course Workflow**
- + **Module 4: Lead Management Workflow**
- + **Module 5: Transfer Portal Analytics**

App Admin Onboarding Session On-Demand

Please review the materials and on-demand recording below from the App Admin Onboarding session held on June 15, 2022.

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

- App Admin Onboarding Modules
- <https://eab.com/technology/resource/enrollment/transfer-portal-app-admin-resources/>

Questions?



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