



EAB

# Transfer Portal Support Office Hours

Wednesday, February 2<sup>nd</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#

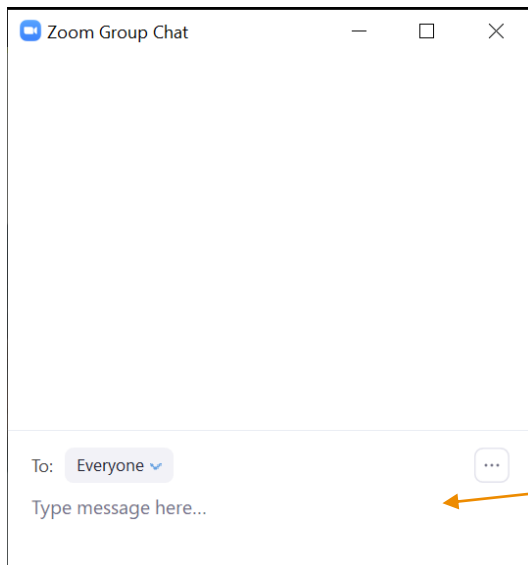
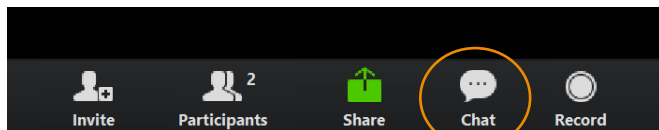
Or Telephone:

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

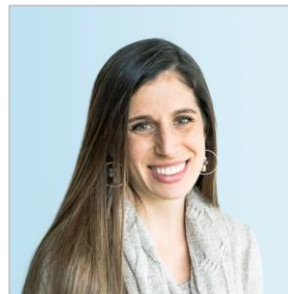
- Click **Participants** in your menu bar.
- On the right side of the screen, hover over your name, click more, and then click **Rename**.
- Add a dash and your institution name. You may also add your pronouns if you wish (example: they/them/theirs)

The image shows a Zoom meeting interface. The main window displays a slide with the EAB logo and the text "EAB Virtual Meetings 2020". A participant's video feed is visible in the bottom right corner. The "Participants" menu is open on the right side of the screen, showing a list of participants: "Test Participant (Me)" and "Meeting Host (Host)". The "Rename" button is highlighted in the "Test Participant (Me)" row. Below the main window, a "Rename" dialog box is open, prompting the user to "Enter a new screen name:". The text "Jane Doe- They/Them/Theirs- Institution" is entered in the input field. The dialog box has "OK" and "Cancel" buttons at the bottom.

# Today's Presenters



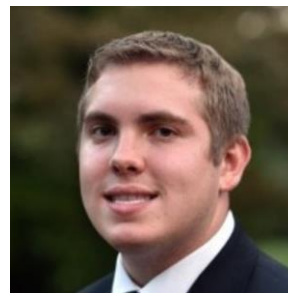
**Allison Akalonu**  
*Transfer Portal*



**Gina Schorr**  
*Partner Support*



**Bonnie Sullivan**  
*Partner Support*



**Brent Rice**  
*Partner Support*

# Upcoming Events

## FEBRUARY

Su	Mo	Tu	We	Th	Fr	Sa
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	1	2	3	4	5

### Office Hours

- Topic: Intro to EAB's Support Suite
  - Intro to EAB's Help Center, accessing eab.com, identifying App Admin role

### Transfer Intensive Limited Series

- Session 1: Transfer Maturity Curve and Self-Assessment Overview

## MARCH

Su	Mo	Tu	We	Th	Fr	Sa
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

### Office Hours

- Topic: Transfer Portal Planner
  - App Admin Training, tracking decisions and work overtime

## APRIL

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

### Office Hours

- Topic: Lead Management & Impact Tracking in CRM
  - New data automation feature

### Transfer Intensive Limited Series

- Session 2: Building a Transfer Foundation
  - Transfer data collected
  - Community College Partnership Development

# Summary of Application Administrator Role



## 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

# Logging in to EAB.com

Create an account to register for live and on-demand virtual engagement opportunities

## Step 1

Visit our website, [www.eab.com](http://www.eab.com).

## Step 2

On the top right of the homepage, click the "Log In" button, then select "Create an Account."

## Step 3

On the registration page, you will be prompted to enter your institutional email (e.g., your .edu email address), your institution's country, city, state, and zip code. Once you've input this information, select your institution from the organization drop down list, and click on the "Go to Step 2" button.

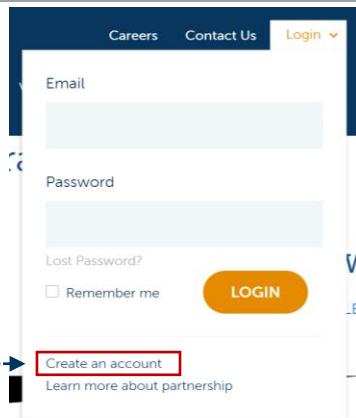
NOTE: If your institution does not appear in the drop-down list, email [eabhhelp@eab.com](mailto:eabhhelp@eab.com) for assistance.

## Step 4

Check your .edu email inbox (including junk and/or spam folders) for an email from EAB.com to verify your email address and create a password for your account. If you haven't received an email after several minutes, email [eabhhelp@eab.com](mailto:eabhhelp@eab.com) for assistance.

## Step 5

Add [Events@eab.com](mailto:Events@eab.com) to your contacts (or ask your IT department) to make sure you receive all event registration confirmations and calendar holds.



Careers Contact Us Login

Email

Password

Lost Password?

Remember me

LOGIN

Create an account

Learn more about partnership

## Register

### Step 1

Email *	Your email
Country *	Select One
State/Province *	Select One
City *	Your city
Zip Code	Your zip code
Your Organization *	Select One

If your organization does not appear in this list, please contact the EAB Help at [eabhhelp@eab.com](mailto:eabhhelp@eab.com).



# Registering for Transfer Portal Virtual Events

Log In to See the Register Button and Register for Selected Sessions

Colleges & Universities

Careers Contact Us Login

EAB About Us Solutions Enrollment Student Success Operations and Strategy Research and Insights Events DEI

Home > Events > Transfer Portal Intensive Limited Series

## Transfer Portal Intensive Limited Series

Select from the dates and cities below:

Feb 09 - 2:00 PM - 3:30 PM — ET - Virtual - TFP

Transfer Portal Intensive Limited Series: Introduction to the Transfer Maturity Curve and Self-Assessment Overview, ET - Virtual - TFP [View in Google Maps](#)

To register for a session, sign into your EAB.com account. In the banner located at the top of the page, use the menu to choose your selected session date(s). Click Register. Repeat this for every session date you wish to register for. You will receive a confirmation email with login details from Events@eab.com.

## Transfer Portal Intensive Limited Series

Select from the dates and cities below:

Feb 09 - 2:00 PM - 3:30 PM — ET - Virtual - TFP

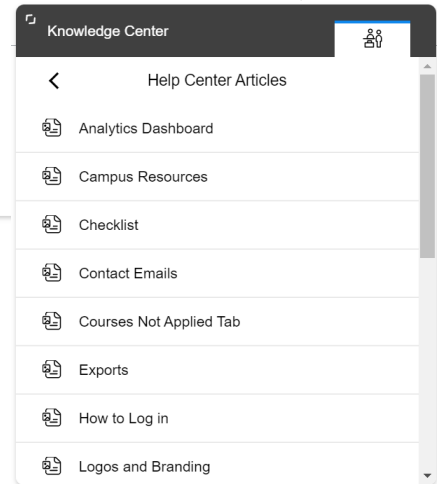
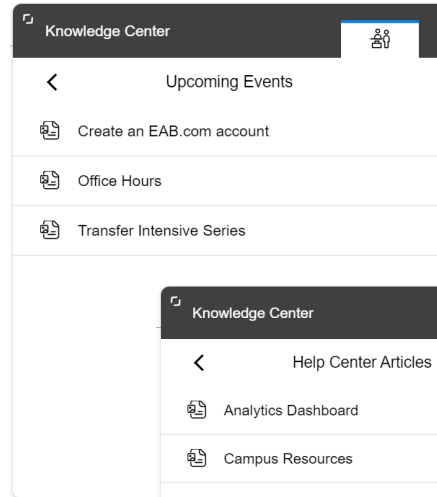
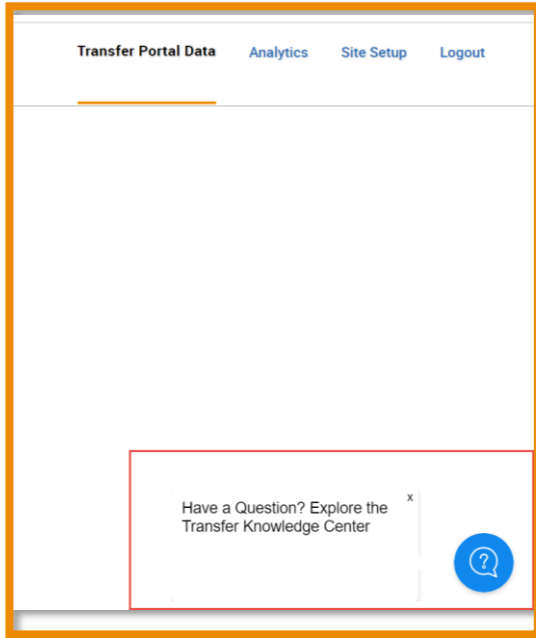
Transfer Portal Intensive Limited Series: Introduction to the Transfer Maturity Curve and Self-Assessment Overview, ET - Virtual - TFP [View in Google Maps](#)

REGISTER

# The Knowledge Center



## Self-service portal help



# Understanding Your EAB Support Teams

## Partner Support Team (PST)



- User access
  - Permission changes
- Site configurations
  - College Name changes
  - Catalog Year changes
- Basic functionality
- Receiving enhancement suggestions
- Site issues

### Shared Items

- New programs
- Triage data issues

[TransferTechSupport@eab.com](mailto:TransferTechSupport@eab.com)

- 1 business day first response
- 3 business days to resolve or triage

## Technical Care Team (TC)



- Data Issues
  - Courses applying to degree audit
- Nightly file feed/automation
- Data Load
- Data Extraction
  - Data inaccuracies
  - Data change requests

- Triage from PST

- 3 business days for TC response
  - Next steps for resolution
  - Triage to internal EAB teams (engineering, DIS) for further troubleshooting

## Strategic Leader (SL)



- Recommendations for optimal configurations for your workflow and content
- Identifying areas of opportunity to strategically expand the use of the technology (breadth and depth)
- Sharing impact from technology usage

Leadership Calls

Individual Email

# Questions?



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