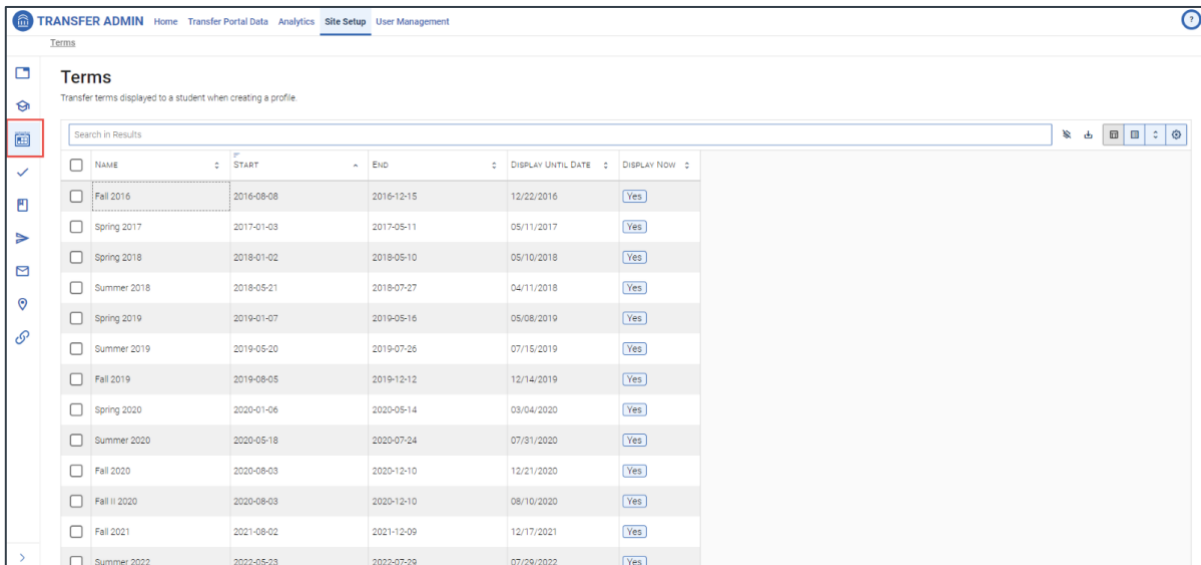# Terms

Overview

Terms allow a student to identify which term they are interested in transferring to your institution. Terms must be manually displayed by Partner for a student to be able to select that term. Terms data are pulled from your institution's SIS's production environment. See FAQ for specific SIS source codes.

To manage Terms:

You can search, filter, and export a list of all terms pulled from your institution's SIS's production environment by clicking on **Site Setup>Terms**.

Term Name, Start Date, and End Date are pulled directly from your SIS and are not configurable in Portal.

To edit Display of Terms:

Display Until Date is used to determine when a term should be available for a student to choose from in the Portal. To edit a date, double click on date under the Display Until Date column, which will open a calendar in which you can select a new date.

	NAME ⇕	START ⇕	END ⇕	DISPLAY UNTIL DATE ⇕	DISPLAY NOW ⇕
☐	Fall 2016	2016-08-08	2016-12-15	December 22, 2016 ⌃	Yes
☐	Spring 2017	2017-01-03	2017-05-11		
☐	Summer 2023 Tentative Dates	2023-05-22	2023-07-28		
☐	Summer 2019	2019-05-20	2019-07-26		
☐	Fall 2022 Tentative Dates	2022-08-08	2022-12-16		
☐	Spring 2018	2018-01-02	2018-05-10		
☐	Fall 2020	2020-08-03	2020-12-10		

Display Now indicates that a term is available for students to view and select as the term they are interested in transferring to your institution. To edit Display Now, double click the Yes or No indicator which will allow you to 'check' or 'uncheck' the box.

| DISPLAY NOW ⇕ |
|---|
| ☑ |
| No |
| Yes |
| Yes |

To search and filter terms table:

Type your search criteria in the Search in Results bar at the top of the table and filter your view by selecting or deselecting filters. Any search or filter can be reset by selecting the Clear all sorts and filters button next to the search bar.

	NAME ⇕	START ⇕	END ⇕	DISPLAY UNTIL DATE ⇕	DISPLAY NOW ⇕
☑	Summer 2023 Tentative Dates	2023-05-22	2023-07-28	07/28/2023	Yes
☑	Summer 2019	2019-05-20	2019-07-26	07/15/2019	Yes
☑	Summer 2018	2018-05-21	2018-07-27	04/11/2018	Yes
☑	Summer 2020	2020-05-18	2020-07-24	07/31/2020	Yes
☑	Summer 2022	2022-05-23	2022-07-29	07/29/2022	Yes
☐	Summer 2024 Tentative Dates	2024-05-20	2024-07-26	05/15/2024	Yes
☐	Summer 2025 Tentative Dates	2025-05-19	2025-07-25	05/19/2025	No

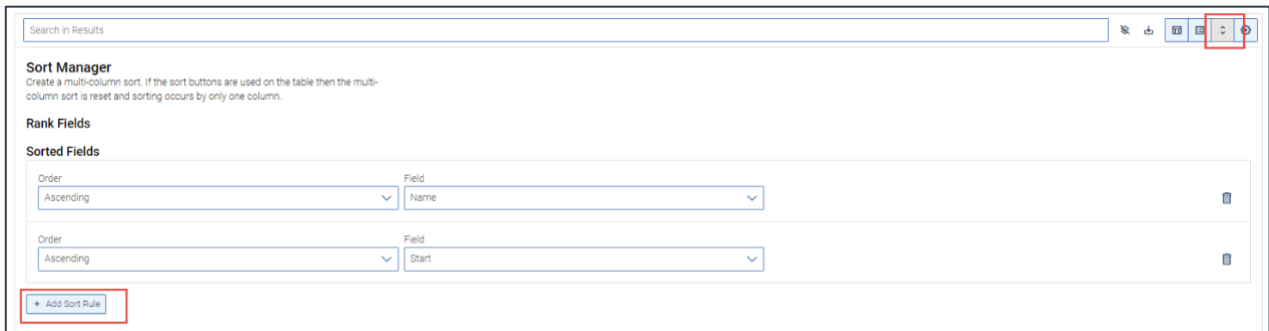5 selected Select Filtered | Deselect Filtered   1 - 7 of 7 100 K < 1 > >|
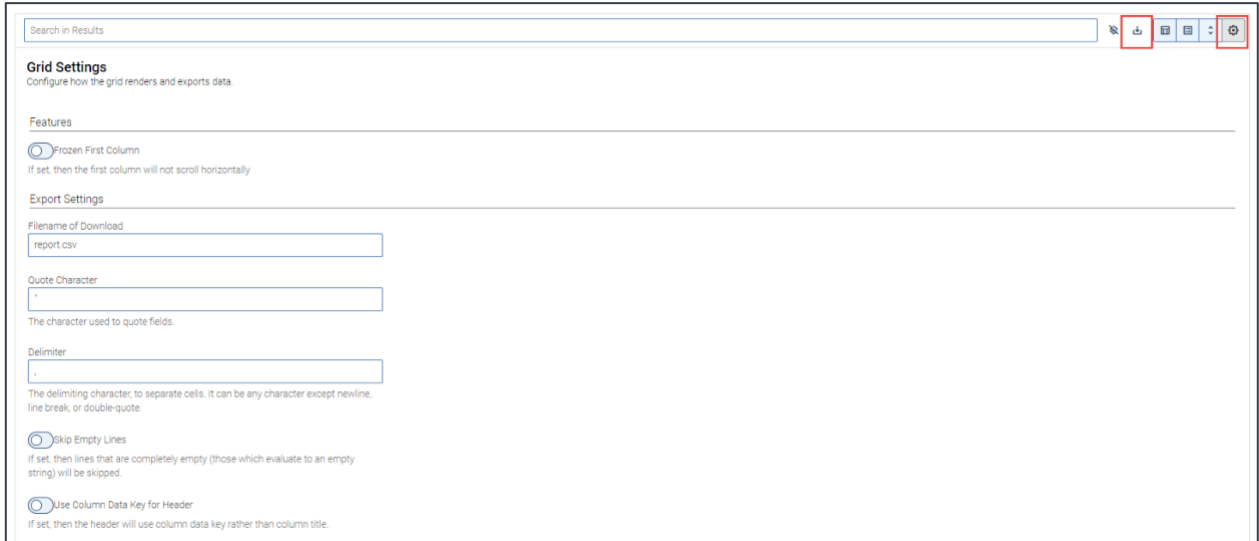
Clicking the **Column Manager** button allows you to adjust the column order.
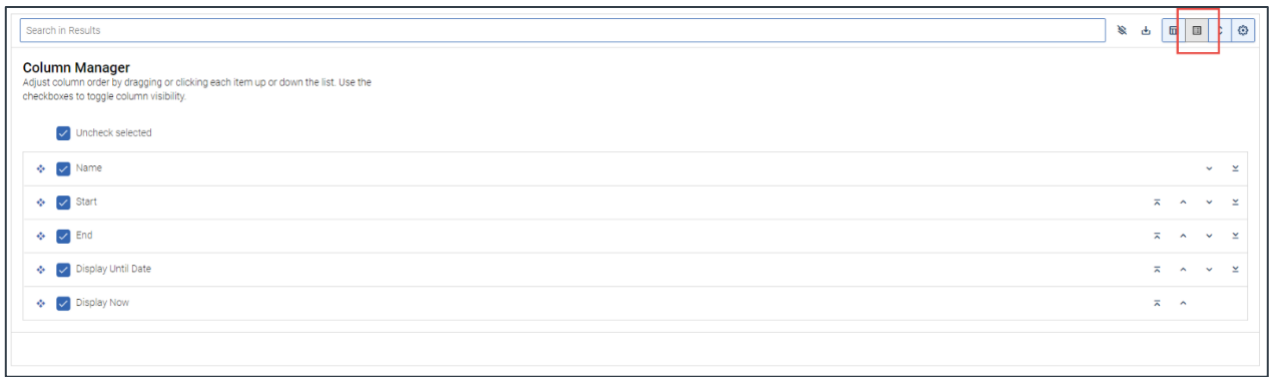
Clicking the **Sort Manager** button allows you to create a multi-column sort.

Clicking the **Grid Settings** gear button allows you to determine how the grid data will be exported, and then the grid can be exported by selecting the Export button.

Frequently Asked Questions:

What Are EAB's Best Practices regarding Terms?

- Have 2-4 years' worth of terms built into your SIS to pull into the Portal.
- Set Display Until Date to when you are no longer accepting students for the related term.
- Review displayed terms on an annual basis, and update Checklist items as needed.

eab.com

What are the specific SIS source codes that determine which terms pull into the Portal?

- ***Banner***
    - *table name: stvtermm*
    - *column names: stvterm_code, stvterm_desc, stvterm_start_date, stvterm_end_date*
- ***Peoplesoft***
    - *Table name: ps_term_tbl*
    - *Column names: strm, descr, term_begin_dt, term_end_dt*
- ***Colleague***
    - *Table name: terms*
    - *Column names: terms_id, term_desc, term_start_date, term_end_date*