

Staff User Management

What is Staff User Management?

The Transfer Portal offers a permission group to manage staff users. By default, the User Management section is managed by the institution's Application Administrator.

Feature Overview


Staff Access and Login:

New staff users must first create a profile at your staff URL using an email with the school's domain to be given access to Transfer Portal's Admin Site. The staff URL will have "/staff/" at the end of your Portal URL (e.g., woodley.transfer.degree/staff/). Staff will either create a new account or use their existing Transfer Portal credentials to log onto the staff site.

If staff users attempt to login using the student-facing URL, an invalid user credentials error will display.

Account Login

Email *

Password * 

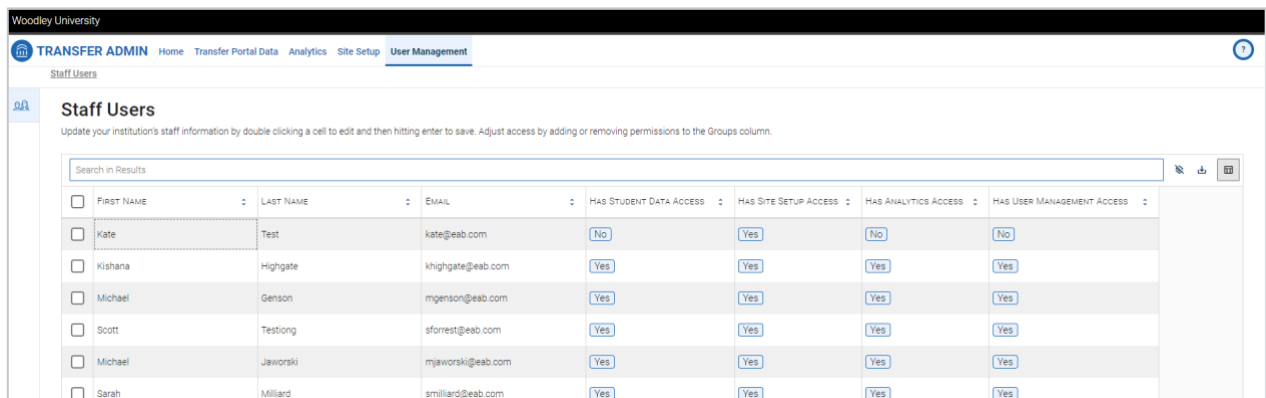
Login

OR

[Forgot Password](#) [Create a Profile](#)

Managing User Permissions:

You can add and remove users from permissions to manage their portal access. When you double click on the permission section you can manage the access by checking or unchecking the checkbox for each permission group to "Yes" or "No."



	FIRST NAME	LAST NAME	EMAIL	HAS STUDENT DATA ACCESS	HAS SITE SETUP ACCESS	HAS ANALYTICS ACCESS	HAS USER MANAGEMENT ACCESS
<input type="checkbox"/>	kate	Test	kate@eab.com	No	Yes	No	No
<input type="checkbox"/>	Kishana	Highgate	khighgate@eab.com	Yes	Yes	Yes	Yes
<input type="checkbox"/>	Michael	Genson	mgenson@eab.com	Yes	Yes	Yes	Yes
<input type="checkbox"/>	Scott	Testlong	sforrest@eab.com	Yes	Yes	Yes	Yes
<input type="checkbox"/>	Michael	Jaworski	mjaworski@eab.com	Yes	Yes	Yes	Yes
<input type="checkbox"/>	Sarah	Milliard	smilliard@eab.com	Yes	Yes	Yes	Yes

Permission Definitions

Has Student Data Access – ability to view and edit the Transfer Portal Data tab including Prospective Students, Pending Courses, and Exports. *Recommended Users: Program Sponsors, Program Owners, App Admin, Transfer Admissions, Transfer Credit Evaluators, and Lead Management/CRM Leads.*

Has Site Setup Access – ability to view and edit the sections under the Site Setup tab including Majors/Programs, College Details, Terms, Checklist, Campus Resources, Custom Messaging, Contact Emails, Onet Area Code, and Partner Name & Privacy Links. *Recommended Users: Program Sponsor, Program Owner, App Admin, and Transfer Admissions.*

Has Analytics Access – ability to view and download the Analytics dashboards. *Recommended Users: Program Sponsors, Program Owners, App Admin, Transfer Admissions, Position Team Leads, and Workflow Team Leads.*

Has User Management Access – ability to view and edit Transfer Portal users' permissions. This includes granting additional permissions and deleting users. *Recommended Users: this access permission should be limited to the Transfer Portal App Admin and very few others for user access control.*

To filter by permission group:

Click the arrow to the right of the **Groups** header to apply as a **filter**.

To delete a user:

First, you must locate and select the user you want to delete, then the **Delete** button displays allowing you to remove the user.

	FIRST NAME	LAST NAME	EMAIL
<input type="checkbox"/>	Kishana	Highgate	KHighgate@eab.com

To edit a field:

Double click the cell you want to change, to put the field in **Edit Mode**. You can hit **Enter** to save your changes.

	FIRST NAME	LAST NAME	EMAIL
<input type="checkbox"/>	Kishana	Highgate	KHighgate@eab.com

To export your results into Excel:

You can export your results into Excel for further reporting capabilities. For example, you can use the search field to narrow your results and then export those results into Excel.

Staff Users							
Update your institution's staff information by double clicking a cell to edit and then hitting enter to save. Adjust access by adding or removing permissions to the Groups column.							
	FIRST NAME	LAST NAME	EMAIL	HAS STUDENT DATA ACCESS	HAS SITE SETUP ACCESS	HAS ANALYTICS ACCESS	HAS USER MANAGEMENT ACCESS
<input type="checkbox"/>	Test	Student	appleseed@eab.com	FALSE	FALSE	FALSE	FALSE
<input type="checkbox"/>	Test	Student	test178@eab.com	FALSE	FALSE	FALSE	FALSE
<input type="checkbox"/>	Chelsea	Hunt	chunt@eab.com	FALSE	TRUE	FALSE	FALSE
<input type="checkbox"/>	Brenda	Smith	test12345@eab.com	FALSE	FALSE	FALSE	FALSE
<input type="checkbox"/>	Matthew	Sheldon	msheldon@eab.com	X	X	X	X

