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How to Use this Guide

This guide was created to walk a partner step-by-step through setting up their Portal.

If you have questions about anything in this guide, reach out to your EAB support team.

Default Content

Default Checklist and Campuses Resources will be added to your Portal. You have the option to edit the existing content or completely overhaul it.

Icon Guide



This icon is used to signify that there is more information about a given topic somewhere else in the guide.



Used to signify this editor is a WYSIWYG and allows for formatted text.

Tip

This box is used to point out something useful when adding or editing content in Portal. This is strictly *for your information*.

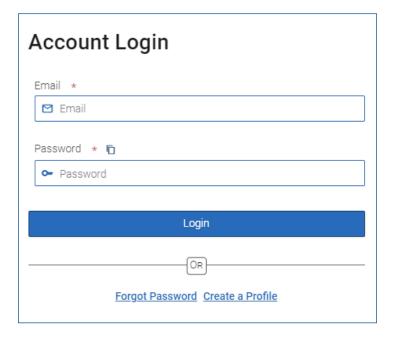
EAB Best Practice

This box is used to note things EAB will likely call out during Content Validation prior to Portal Go-Live. You should be able to justify *not* following these standards, if you choose, to your EAB support team.



Logging in with Staff Credentials

- Navigate to your institution's Transfer Portal staff login page either on Google Chrome or Mozilla Firefox.
- Enter your staff credentials.
- Contact the EAB support team if you have trouble logging in.



Tip

Ensure you're using the most updated version of your browser by navigating to https://www.whatismybrowser.com/

 On the staff-facing dashboard, ensure you have access to Site Setup in the navigation ribbon in the top right corner. If you do not have access, email the EAB Transfer Portal support team adjust your account permissions.

Home Transfer Portal Data Analytics Site Setup User Management

Using the WYSIWYG Editor

- WYSIWYG Editors are used in many places throughout Portal to edit content:
 - Checklist Item
 - · Campus Resources
 - · Major Management
- The editor provides many ways to format content:
 - · Bold, Italicize, Underline
 - · Bulleted or Numbered lists
 - Hyperlinking
 - Right, Center, Left justification of text
- Using the Format drop down, you can also Strikethrough text, or add super-or-sub script if needed.



TIP

If copying and pasting text into the editor, always **Paste as Plain Text**. You can update formatting in the editor itself.

EAB Best Practice



Stay consistent with editing styles. Portal should look like an extension of your website.

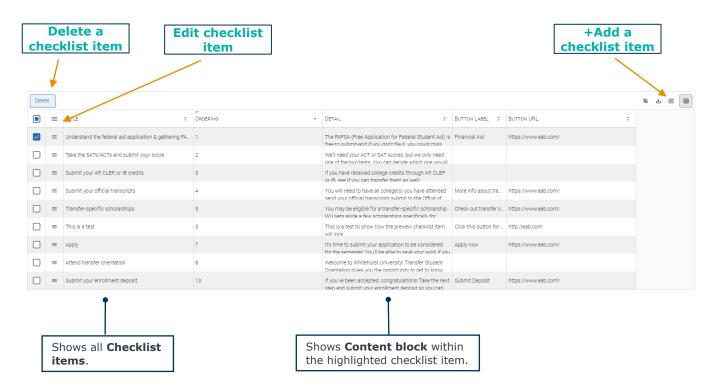


Checklist

Overview & Navigation

The Checklist outlines next steps for prospective students intending to transfer to your institution.

- To add a new **Checklist item**, click **+button** above the list of Checklist items on the right side.
- To delete a **Checklist item**, select the Checklist item and the click the Delete button in the top left corner.
- To edit a **Checklist item**, select the hamburger icon (i.e., 3 bar icon) and click on Edit.





EAB Best Practice



Customize your Checklist to reflect your institution's key steps in the admission process but try to limit the quantity of steps to 8 or fewer Checklist items.

- a checklist item above the list of Checklist items. To delete a **Checklist item**, hover over
- the Checklist item and click the **X** button in the top right corner. This will automatically populate a message requiring confirmation to delete that item.

Adding & Editing a Checklist Item

- Title Enter the desired name of your Checklist item
- You cannot link to other websites in Checklist item titles.
- Order Choose the position in which you want this item to appear in the Checklist.
- Body No limit to characters that can be added to this section. As you type, content will populate in real time in the Preview to the right of the editor.
- Button label (Optional) -Checklist allows an institution to link to the call to action of any given Checklist item. Keep the button label succinct and specific. If you choose to add a button to a Checklist item, it will be rightjustified and blue in color.
- Button URL (Optional) -Copy and paste the destination URL for the call to action the button label references. By default, when this button is clicked by a student, it opens a new window.
- To save your content, click Submit. Your edits will be updated in real time in student view.



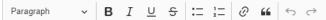
Checklist Item

Title *

Understand the federal aid application & gathering FAFSA information

Ordering *

Detail



The FAFSA (Free Application for Federal Student Aid) is free to submit-and if you don't file it, you could miss out on the largest source of college funding available.

Learn about the FAFSA

While the FAFSA qualifies you for federal aid, many state governments and colleges also use it to award their own aid, including:

- Grants and scholarships: Money you don't have to pay back Work-study jobs: Paid, part-time work that's generally on campus
- Loans: Money you need to pay back, usually after you graduate

If you plan on borrowing money to pay for college, the federal government offers low-interest loans that typically provide flexible and favorable payment options that don't begin until after

Everyone who's getting ready to go to college or career school should fill out the FAFSA! Gather information for filing the FAFSA

When you file the FAFSA, you'll be asked for information about yourself (your name, date of birth, address, etc.) and your financial situation.

Know the documents you'll need

Depending on your circumstances, there's additional information you'll need to fill out the FAFSA:

- Your Social Security number (it's important that you enter it correctly on the FAFSA!)
 Your parents' Social Security numbers if you are a dependent student
 Your driver's license number if you have one
 Your Alien Registration number if you are not a U.S. citizen
 Federal tax information or tax returns, including IRS W-2 information, for you (and your spouse, if you are married) and for your parents if you are a dependent student Keep these records! You may need them again. Only submit the FAFSA form. Do not mail your tax returns or other personal records.

Get additional help

Button Label

Financial Aid

Button URI

https://www.eab.com/

Submit



EAB Best Practice

Keep your Checklist Items focused to one call to action, especially if using a button to link to another page.

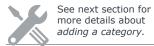


Campus Resources

2

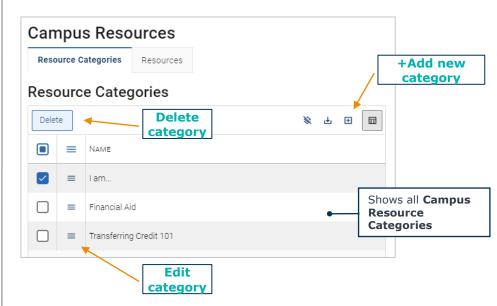
Overview & Navigation

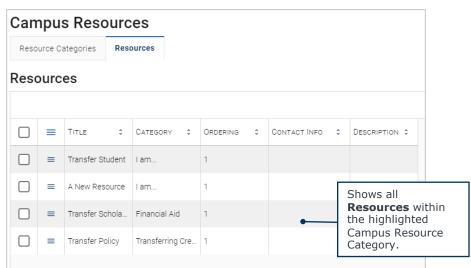
- To add a new category, click on the + new category button on the right top side.
- To delete a category, select the category you'd like to remove and click the delete button.
- To edit a category, click on the hamburger icon for the category you'd like to change and click Edit.



- You can add multiple resources to a category.
- To add a new resource, click the + new resource button on the top right side.
- To edit a resource, click on the hamburger icon for the resource you'd like to change and click Edit.
- To delete a resource, select the resource you'd like to remove and click the delete button.
- Each resource has two sections to add content: Contact Info and Description.

This section of the Portal is an institution's opportunity to provide extra information specifically related to transfer students.







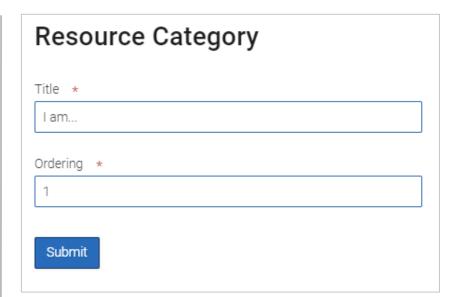
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LTE

These resources can and should be regularly updated with new content for transfer students after your Portal goes live. Think about over-arching themes to your content and use those as categories.

Add a Category

- All fields in this form are required.
- Title: Enter the desired name of your Resource Category
- Order: Choose the position in which you want this item to appear in Campus Resources.
- Click **Submit** to save your changes.



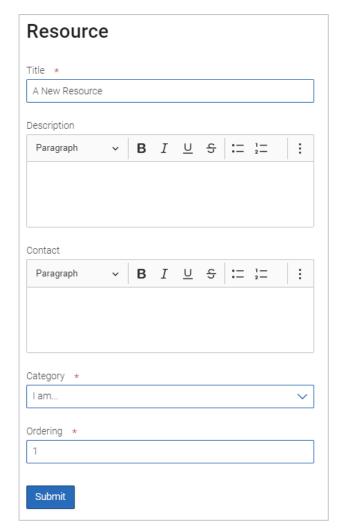
TIP

Unlike the Checklist, you can manually manipulate the order of the Resource Categories by changing only order numbers for **Categories** that already exist.

Add a Resource

- Title Enter what you want to call this Resource. This field is required.
- Description No limit to characters that can be added to this section. As you type. This field is optional but will still be present in the student view regardless of content added.
- Contact Add information for a student to learn more. This field is optional but will still be present in the student view regardless of content added.
- Category Choose the Category in which you want this Resource to live. This field is required.
- Order Relevant for instance when there are multiple Resources in a Category. This indicates the placement on the page when the student views this category. This field is required
- Click **Submit** to save your changes.





EAB Best Practice

Add as much Contact information as possible, such as an Office Name, email address, website, phone number, etc.



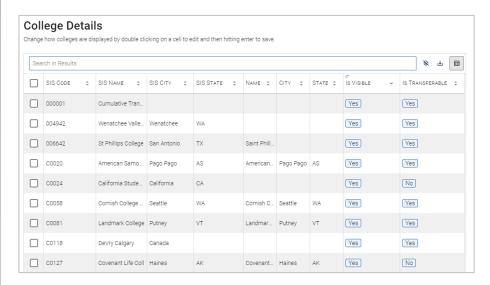
Colleges/Majors/Programs

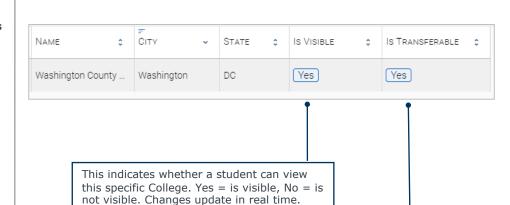


College Display Details

- Change if/how colleges are displayed.
- Type your search criteria in the search field, then click enter to display the results.
- To edit a field, double click the cell you want to change to put the field in edit mode.
 - Type your new information for the cell and hit **Enter** or click out of the box to save your changes.
 - The following fields cannot be edited: SIS Code, SIS Name, SIS City, and SIS State.
- To change if the College is Visible or Transferable, click into the field and change to either "Yes" or "No" accordingly.
 - You do not have to hit Enter when editing the "Is Visible" or "is Transferable" fields.

The College Details page allows Staff to edit College Details and export the data into an Excel spreadsheet. The College Details page can be accessed by clicking on **Site Setup > College Details.**



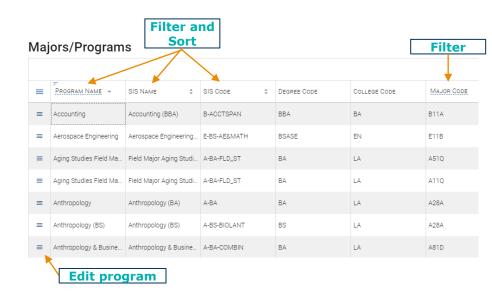


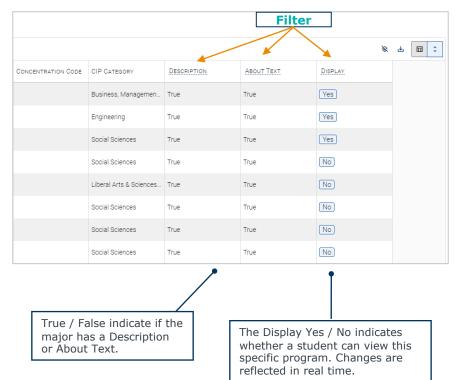
This indicates whether a student can or cannot apply courses to transfer into this College. Yes = is transferrable, No = is not transferrable. Changes update in real time.

Majors/Program Overview & Navigation

- All Programs are pulled from your institution's Student Information System (SIS).
- There are multiple ways to Search, Sort and Filter the Majors/Programs in Portal:
 - Program Name Filter and Sort by specific program name
 - SIS Name by clicking SIS Name, you can filter and sort in ascending or descending alphabetical order
 - SIS Code by clicking SIS Code, you can filter and sort in ascending or descending alphabetical order
 - Major Code Filter by specific program code
 - Description ability to filter by True or False.
 This is also referred to as "Long Description".
 - About Text ability to filter by True or False.
 This is also called "Short Description".
 - by Yes or No, when the checkbox is selected=Yes, is checkbox is unselected=No. A Major/Program that is not visible shows as No. A Major/Program that is visible shows as Yes. Simply click into the box to change the Display status.

The Major/Program Manager allows you to control which majors are visible or not to the student view, along with transfer specific information about each.

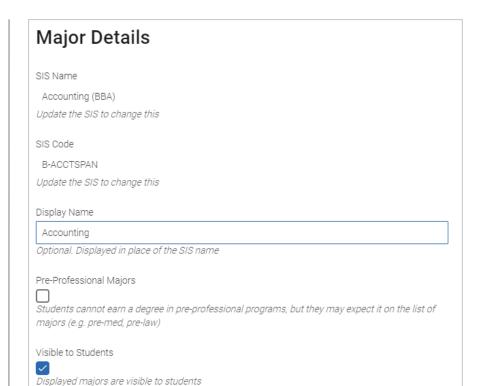


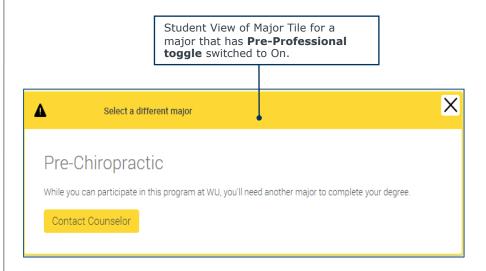


Editing a Program

SIS Info & Display Options

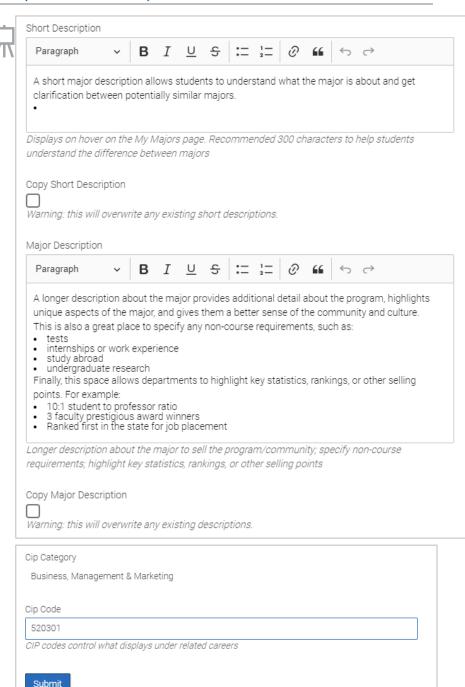
- You can edit the Display Name of the major. This will only display in the Portal and will not make any changes to your SIS data.
- The Pre-Professional major toggle should be used specifically for programs that a student cannot earn a degree in.
 When this is toggled On, the program remains visible in the Portal and is selectable on the Majors tab. However, it produces a warning message and a student will not be able to create an unofficial credit evaluation for this program.
- Visible to Students toggle – Ask yourself the below questions:
 - Is this major currently accepting transfer students?
 - Are the degree requirements built in the degree audit system for this program?





Editing a Program (Continued)

- Short Description is displayed when a student hovers over a major/program in the My Major tab of Portal.
- For programs with concentrations, you can check the **Copy About the Major descriptions** box to do exactly that. This will override descriptions that may exist in those majors currently. When this box is checked, Portal looks at a combination of major+program+degree+co ncentration code to determine which programs should share descriptions.
- **About the Major Description** (also called Long Description) section should be used to add more information about the program and insert hyperlinks back to your website. This is an opportunity for a partner to add information about internships, exam preparation, research, etc. You can also copy this description to all concentrations within the major.
- Only CIP Code can be overridden. If a CIP code needs to be changed, you can search on IPEDS CIP Categories for a better fit. If you edit a CIP code, you'll need to refresh the related careers to see new jobs and subsequent data. See the next section for more detail.



EAB Best Practice

Short Description should only be **1-2 sentences**, **limited to 200-400 characters** and used to easily distinguish between similar programs. Short description supports some rich text editing (bolding, linking, headers) but not other (bullets, block quotes).



Changing a Program's Category or Related Careers

For each program, the Transfer Portal pulls from the program's CIP code to inform the default Category and Related Careers that are displayed to students on the front-end of the site.

The initial CIP code loaded into the Transfer Portal comes directly from the institution's SIS.

However, the CIP code can be configured in the Site Setup area to change the corresponding **Category** and **Related Careers**.

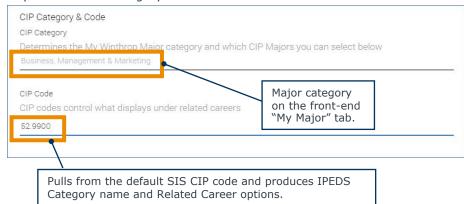
Category

 The program's category pulls directly from the <u>IPEDS' CIP Category</u>. In the Transfer Portal, you cannot customize the category name, but you can move the program into a more suitable IPEDS category, as needed.

Related Careers

EAB matches the program's CIP code to the corresponding U.S.
 Department of Labor
 ONET* database to provide potential national or state-level labor market outcomes. Like Category, you cannot customize the specific Related Careers, but you can override the CIP code to produce a more favorable Related Career, as needed.

Let's use the following example: the program Chemistry: Business (BS) was in the Business, Management & Marketing program category, but that program is more of a "Chemistry" major, so we want to move to the Physical Science category.

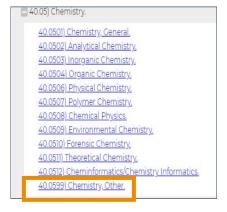


Step 1: Navigate to IPEDS' CIP category area

https://nces.ed.gov/ipeds/cipcode/browse.aspx?y=56 and determine a more appropriate CIP code for this program. Scroll through list and find a high-level category. In this instance, we know we want to move Chemistry: Business to Physical Sciences.



Step 2: Expand the category and find a more specific option and 6-digit code.



Step 3: Enter the new 6-digit code into the CIP Code section of the program's Transfer Portal Site Setup area.

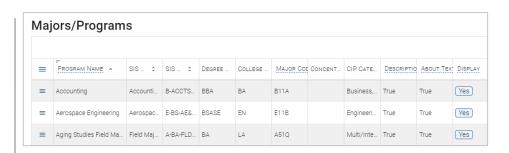
^{*} Keep in mind that when you override the CIP code, the new code will affect both Category and Related Careers.

Adding New Programs

During implementation and after you go-live, there will be times we need to add in programs that are not autoloaded into the Transfer Portal Site Setup area.

To do that, EAB will need to know which programs are missing.

Specific steps for this process are outlined to the right.



Steps to Add New Programs into Transfer Portal

- Ensure the new program is built in the SIS with degree requirements in the degree audit system (production).
- Notify EAB with list of new programs. This list should include the following for each program:
 - · Sis code
 - · College_code
 - · Degree code
 - Major_code
 - Concentration_code (optional)
 - Degree_title
 - Major_title
 - Concentration_title (optional)
 - Cip_code
- EAB to pull in new program(s) from data and notify partner when complete.
- In Site Setup, partner loads program description information and turns **Display** to "Yes"
- Partner to turns **Display** to "No" for any programs that are no longer being recruited.
- Program immediately displayed on the front-end of the Transfer Portal.
- Partner to check that new program's Degree Completion page is working as expected.



Custom Messages

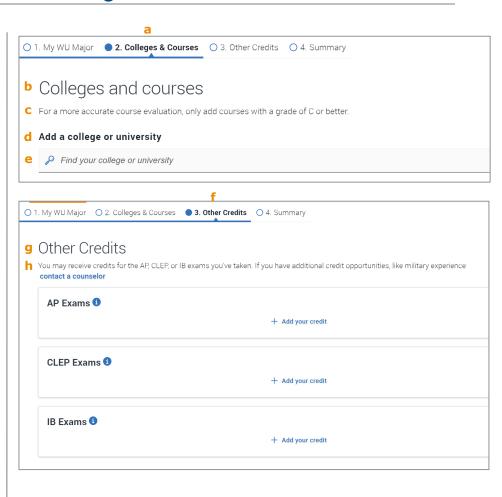


Editing a Custom Message

- (a) Colleges and Courses
 Tab edits the second tab
 in Transfer Portal, where
 students input prior
 institutions and coursework.
- (b) Colleges and Courses
 Header edits the header
 of the second tab in
 Transfer Portal.
- (c) Colleges and Courses
 Description- displays at
 the top of the Past Colleges
 & Courses page to help
 students know which
 courses to add. Can add link
 to "Contact a counselor".
- (d) Colleges Sub-header

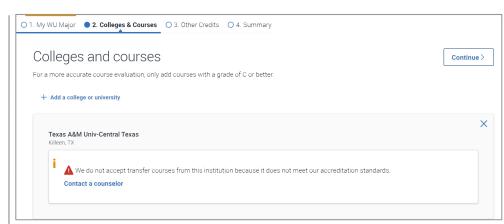
 edits the text above the
 college list predictive
 search.
- (e) Colleges Search Box

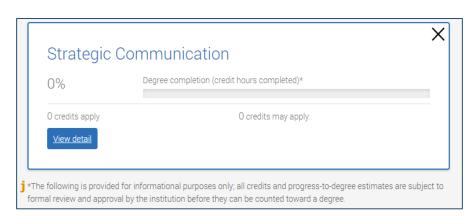
 edits the instructional text in the college list predictive search.
- (f) Other Credits Tab –
 edits the third tab in
 Transfer portal, where
 students in put prior exams
 or different credit types.
- (g) Other Credits Header
 edits the header of the
 third tab in Transfer Portal.
- (h) Other Credits
 Description displays at
 top of the Other Credits
 page to help students know
 which exams to add, how to
 search for exams, etc. Can
 add link to "Contact a
 counselor".



Editing a Custom Message, continued

- (i) Non-transferrable
 Institution this displays
 when a student adds a
 college that your institution
 knows is not accredited, is
 considered a nontransferable institution, or is
 a school that you want
 students to find but don't
 want them to add credit
 (e.g. international schools).
 Can add link to "Contact a
 counselor".
- (j) Disclaimer this displays under selected major tiles and should be considered as your unofficial credit estimation statement for student's when using the Transfer Portal.







Terms



Editing Terms

- Terms data are pulled from your institution's SIS's production environment*.
- By default, we see a full list of terms setup in your SIS (including past and future terms)
- Name is pulled directly from your SIS and is not configurable in Portal.
- Start and End dates to the right of Name reflects the start and end date of the term setup in your SIS.
- Display Until Date is used to determine when a term should be available for a student to choose in the Portal.
- Display Now indicator
 works the same way as in
 Major/Program Manager
 with the Yes/No toggle.
 Once a Display Until Date
 has passed, students can no
 longer see or select this
 term in Portal. However, the
 Display Now indicator does
 not update in the stafffacing Site Setup area.

*Specific SIS source codes:

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

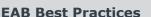
Colleague

- Table name: terms
- Column names: terms_id, term_desc, term_start_date, term_end_date

Terms are used for a student to self-report their intended enrollment term.

Terms Transfer terms displayed to a student when creating a profile.								
Search in Results								
	NAME ^	START 0	END \$	DISPLAY UNTIL DATE \$	DISPLAY NOW \$			
	Fall 2016	2016-08-08	2016-12-15	08/08/2016	Yes			
	Fall 2017	2017-08-07	2017-12-14	08/07/2017	Yes			
	Fall 2018	2018-08-06	2018-12-13	08/06/2018	Yes			
	Fall 2019	2019-08-05	2019-12-12	08/05/2019	Yes			
	Fall 2020	2020-08-03	2020-12-10	08/03/2020	Yes			
	Fall 2021	2021-08-02	2021-12-09	08/02/2021	Yes			
	Fall 2022	2022-08-08	2022-12-15	08/08/2022	Yes			
	Fall 2023	2023-08-07	2023-12-14	08/07/2023	Yes			
	Fall 2024	2024-08-05	2024-12-12	08/05/2024	Yes			

DISPLAY UNTIL DATE	\$ DISPLAY NOW	\$
08/08/2016	Yes	
08/07/2017	Yes	
08/06/2018	Yes	
08/05/2019	Yes	



- Have 3-4 years worth of terms built in your SIS to pull into Portal
- Set Display Until Date to when you are no longer accepting students for the related term

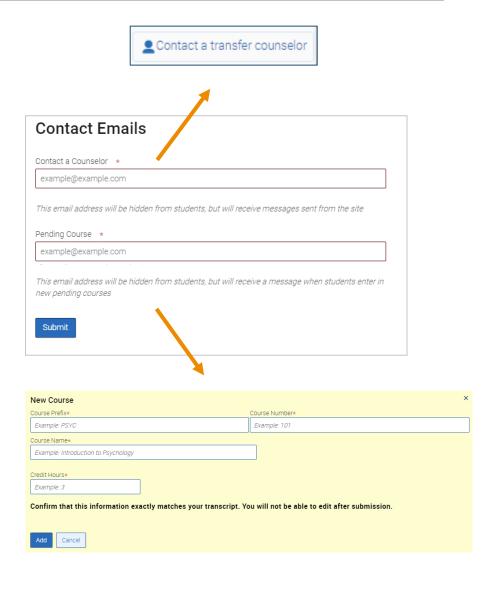


Emails, ONet Area Code, and Short & Long Partner Names



Contact Emails: Counselor and Pending Course

- contact a Counselor –
 this email address will
 receive all inquiries from
 students who click the
 "Contact a Counselor"
 button in the Portal at any
 time. A single email will be
 sent to this email address
 with each inquiry from a
 prospective student. A
 counselor is not able to
 respond to a student's
 inquiry in the Portal, they
 must utilize an institutional
 email address.
- Pending Courses this email address will receive all pending course notifications submitted by prospective students. One email will be sent per pending course submitted.
 - A partner institution can consider **not** adding an email address here if the Pending Course dashboard will be frequently monitored by a staff member.

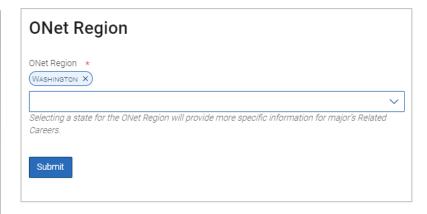


TIP

Consider adding an email address with shared log-in credentials so multiple staff members can check for student inquiries or pending courses.

ONet Area Code, Partner Names & Privacy Link

 ONet Region is used to pull relevant career information for the major or program a student chooses. You have the choice to select National or State level information. This is applied to <u>all</u> programs.



TIP

Think about where your students are going after graduation. Are they staying in the area? Select State. If they are moving away, select National.

- Long Partner Name is your entire institution's name.
- Acronym Name is either your institution's acronym or some other shortened version of your institution's name.
- Privacy Policy link will direct users to your institution's FERPA policy webpage.

