

Transcript Management

Purpose:

The Transcript Management feature allows TRAIN administrators to move registrations across learner accounts.

This user guide outlines a straightforward and secure method for transferring learner records, ensuring data integrity and confidentiality throughout the process.

Administrative Roles with Access:

- **Course Attendance Manager**

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1

Navigate to the Course Registrations Page

Go to the (a) Admin menu. Click the (b) Users tile.

(c) Click the Find and Edit Existing Users tile.

TRAIN ADMIN SEARCH USER SITE HELP

Select Category

- Organizations: Add and manage organizations and their membership.
- Approvals: Manage course registration approvals.
- Users (b)**: Add and manage users.

Users

- + Add new users: Add a new user to the system.
- Find & edit existing users (c)**: Find/edit users, and modify their groups and roles.

(d) Use the search bar to find a specific user.

(e) Click the Course registrations option in the three-dot menu located to the right of the user's name.

bhatt, amrita (d) Search Sort by relevance Show

197 record(s) found.

Name	Login	Email
Bhatt, Amrita	amrita29	[Redacted]
Bhatt, Amrita	abhattachnational	[Redacted]
	abhattachadmin	[Redacted]
	abhattachcp	[Redacted]
		MaskedEmail.791203@bogus.e...
		MaskedEmail.1366526@bogus...

Course registrations (e)

Navigate to the Transfer Registrations Page

2

Check the (a) box next to the registrations you wish to manage. Click the (b) Actions button. Select the (c) Transfer registrations option from the dropdown menu. This will take you to the (d) Transfer Registrations page.

Actions (b)

1 record selected

- Deactivate
- Activate
- Verify
- Unverify
- Bulk Edit
- Status to Withdrawn
- Status to Not Started
- Status to Pending
- Status to Approved
- Status to Declined
- Status to Pre-Assessment Pending
- Status to In Progress
- Status to Post-Assessment Pending
- Status to Evaluation Pending
- Status to Failed
- Status to Passed
- Status to Completed
- Status to Expired
- Transfer registrations (c)**

Amrita Bhatt > Course registrations

Actions Filter by Status 14 Active Inactive Verified Unverified Filter by format 11

Course	Completed	Score	Status
<input type="checkbox"/> Amrita's Test BLS (Exercises)	Dec 19, 2024		Completed
<input checked="" type="checkbox"/> CDC Project Firstline: What is a Respirator?	Dec 19, 2024		Completed Verified
<input type="checkbox"/> CM4671 - (Test), 2023 Wyoming Immunization Conference, (In Person) - Casper, WY - September 11-13, 2023	Mar 15, 2024		Passed Verified
<input type="checkbox"/> Content that has only Assessments	Aug 22, 2024		Completed Verified
<input type="checkbox"/> DRS TEST 082324 (C1 - NRC)	Aug 28, 2024		Completed Verified

Back to course registrations (d)

Transfer registrations

From

Field	Value
User ID	4181620
Login name	amritab529
First name	Amrita
Last name	Bhatt
Email	abhattach@phf.org

To

What will be transferred

- Course registrations
- Conference registrations including sessions
- Collection registrations including components
- Credit selections
- Certificates
- Uploaded external certificates
- Registration question answers
- Assessment results
- Evaluation results
- Course reviews

TIP: You can select any number of courses. To select all courses, check the box at the top of the Course column.

3

Transfer Registrations

Transfer registrations from the source user to the recipient user.

- (a) Click the **Search recipient user account** link.
- (b) Search for a recipient user(s) by last name, first name, login name, email, or user ID. Check the box next to the appropriate user(s). Click the blue **Select users** button.

Transfer registrations

Field	Value
User ID	4181620
Login name	amritab529
First name	Amrita
Last name	Bhatt
Email	abhhatt@phf.org

To

[Search recipient user account](#) a

What will be transferred

- Course registrations
- Conference registrations including sessions
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- Credit selections
- Certificates
- Uploaded external certificates
- Registration question answers
- Assessment results
- Evaluation results
- Course reviews

What will not be transferred

- Incomplete registrations, if the recipient already has incomplete registrations for the same course.
- Custom user attributes requested during the registration process
- Prerequisite course registrations

- I understand that the 1 selected registrations will be transferred to the recipient user account
- I understand that if a collection registration is selected, all component registrations will also be transferred
- I understand that both user accounts will receive email notifications about the transfer

Transfer registrations e

Select Users b

Amrita Bhatt

Name	Username	Email
<input checked="" type="checkbox"/> Bhatt, Amrita	amrita29	abhhatt+1@phf.org

→ **Select 1 users**

Transfer registrations

Field	Value
User ID	4181620
Login name	amritab529
First name	Amrita
Last name	Bhatt
Email	abhhatt@phf.org

Field	Value
User ID	4181623
Login name	amrita29
First name	Amrita
Last name	Bhatt
Email	abhhatt+1@phf.org

c → **Change**

- (c) Review the recipient user info. Values in **red** indicate differences from the source user. To choose an alternate recipient user, click the **Change** button.

- (d) Review the parameters for what will and will not be transferred. Check the boxes to acknowledge your understanding of the registration transfer guidelines.

- (e) Click the blue **Transfer registrations** button.

- (f) Review the transfer status.

Transfer registrations f

Transfer has been completed

Registrations moved: 1

Failed: 0

View Transfer History

4

Amrita Bhatt > Course registrations

Actions ▾ Filter by Status **14** ▾ Active Inactive Verified Unverified

Course Completed Sc

→ View transfer history

Transfer history		
User information		
ID	4181620	
Name	Amrita Bhatt	
History		
Date	Administrator	Audit
Dec 18, 2024 9:19 AM EST	Public Health Foundation	2 transferred, 0 failed
Dec 18, 2024 9:23 AM EST	Public Health Foundation	0 transferred, 1 failed
Dec 19, 2024 10:42 AM EST	Amrita Bhatt	3 transferred, 0 failed

Click the **View transfer history** button option from the three-dot dropdown menu on the Course Registrations page to see a list of all past transfer dates, administrators, and audits.

5

View Audit Log

View a log of all actions performed when selected course registrations are transferred from one user account to another.

- (a) Click the link under the audit column related to the transfer you wish to learn more about.

Transfer history

User information

ID
4181620

Name
Amrita Bhatt

Date	Administrator	Audit
Dec 18, 2024 9:19 AM EST	Public Health Foundation	2 transferred, 0 failed
Dec 18, 2024 9:23 AM EST	Public Health Foundation	0 transferred, 1 failed
Dec 19, 2024 10:42 AM EST	Amrita Bhatt	3 transferred, 0 failed
Dec 19, 2024 2:17 PM EST	Amrita Bhatt	1 transferred, 0 failed
Dec 30, 2024 2:08 AM EST	Jane Doe	1 transferred, 0 failed
Jan 22, 2025 12:22 PM EST	Amrita Bhatt	0 transferred, 1 failed

Audit

Event

Event ID
b57782c6-5fbc-4cb5-818f-edc2f625c03b

Timestamp

Jan 22, 2025 12:22 PM EST

Type

Registration transfer

Description

Transfer 1 registrations from user Amrita Bhatt(ID 4181620) to user Shauna Fitzgerald(ID 3797521)

Event originator

Amrita Bhatt

- (b) Under the **Event** section of the audit log, you can view the transfer's event ID, timestamp, type, description, and the person who initiated the transfer (i.e. event originator).

- (c) Under the **Details** section of the audit log, you can view the action's status, severity, the time it took place, and additional processing data.

Details

Action	Severity	Time	Details
Queue	information	Jan 22, 2025 12:22 PM EST	Registration Id: 26172911. Queue registration Id 26172911 for transfer.
Processing	information	Jan 22, 2025 12:22 PM EST	Registration Id: 26172911. Start processing Registration Id: 26172911
Processing	warning	Jan 22, 2025 12:22 PM EST	Registration Id: 26172911. Target user already has active registration for current course.
Processing	information	Jan 22, 2025 12:22 PM EST	Registration Id: 26172911. Finish processing Registration Id: 26172911. The process was completed with error. All changes for the Registration Id: 26172911 have been rolled back.

- (d) The severity column offers an overview of the transfer's impact on registration functionality for users. View language descriptions for potential severity measures below:

Information - the action was processed successfully

Warning - the action was processed successfully, but the outcome conflicted with the software, resulting in a likely failure of the overall transaction

Error - the action was processed unsuccessfully