

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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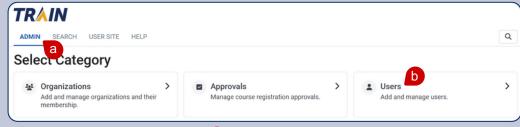


1

Navigate to the Course Registrations Page

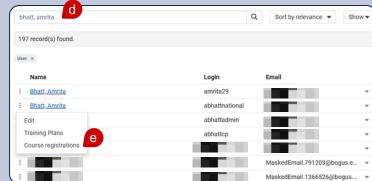
Go to the **(a) Admin** menu. Click the **(b) Users** tile.

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





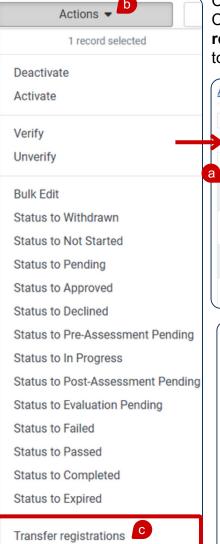
- (d) Use the search bar to find a specific user.
- **(e)** Click the **Course registrations** option in the threedot menu located to the right of the user's name.

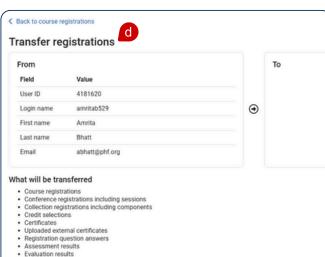


Navigate to the Transfer Registrations Page

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.

Amrita Bhatt > Course registrations Filter by Status 14 -Unverified Filter by format 11 ▼ □ Course ▲ Completed Status □ Amrita's Test BLS (Exercises) Dec 19, 2024 CDC Project Firstline: What is a Respirator? Dec 19, 2024 □ CM4671 - (Test) 2023 Wyoming Immunization Conference (In Person) - Casper, WY - September 11-13, 2023 Mar 15, 2024 : ✓ Verified Content that has only Assessments Aug 22, 2024 □ DRS TEST 082324 [C1 - NRC] Aug 28, 2024 ✓ Verified





· Course reviews

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



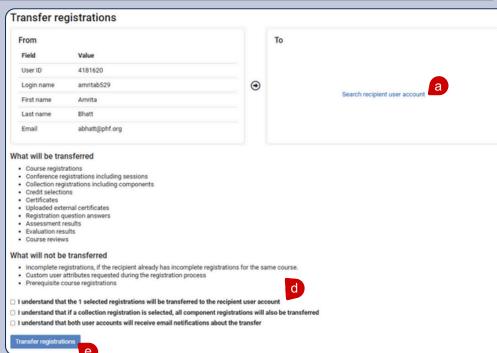
3

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.









- (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

Transfer has been completed

Registrations moved: 1

Failed: 0

View Transfer History



4

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.

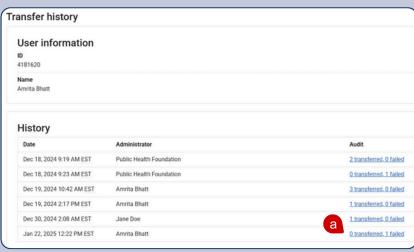


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View Audit Log

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.





(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.



(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

