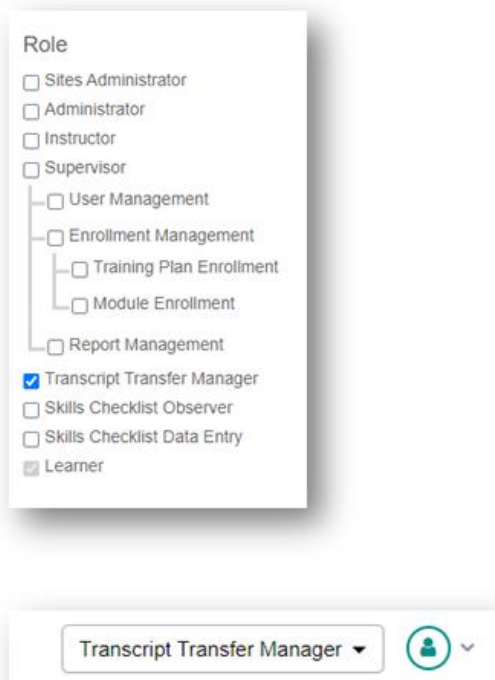# Enterprise Transcript Transfer & Transcript Transfer Manager Role

Overview

The Enterprise Transcript Transfer functionality allows Administrators and a new role, Transcript Transfer Manager, to transfer a learner's transcript from another organization or sub-portal within the enterprise to their own.

How does it work?

Enterprise accounts with sub-portals can opt in to this functionality via their account manager. Once this functionality is enabled via Site1, the Transcript Transfer Manager user role can be granted to any user within one of the sub-portal sites by an Administrator.

All Administrators and users with the Transcript Transfer Manager role can see the "Transcript Transfer" option under the Users menu.
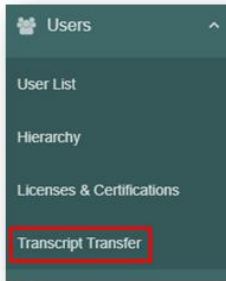
When selected, the Administrator or Transcript Transfer Manager is brought to the Transcript Transfer screen.
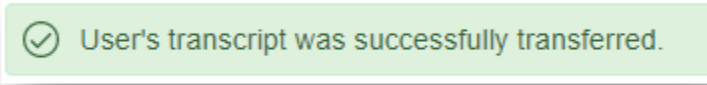

Note this screen's disclaimer that completion records are copied from one transcript to another existing transcript using this tool. A transcript transfer does not move a user's profile information, exam response detail, or current enrollments- only completion records and exam scores.

The top search bar searches across the entire enterprise for the account that the transcript information is being transferred from. The bottom bar searches in the Admin or Transcript Transfer Manager's organization or sub-portal for the user to transfer the transcript to.
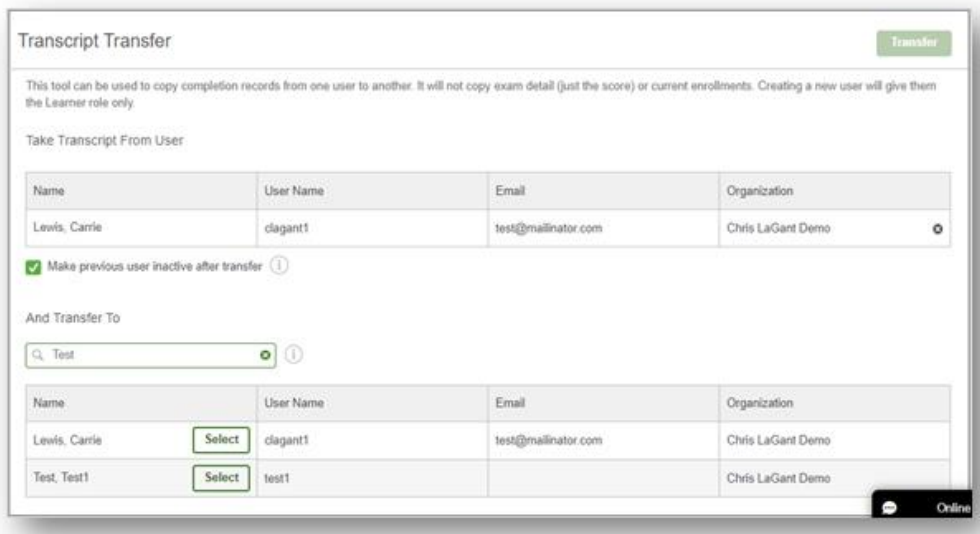
Search for users by name, email address, username, or the Relias-generated User ID, and then click "Select" to choose the correct account for both from and to. By default, the option to "make previous user inactive after transfer" will be selected. Keep this checked to deactivate the from account following the transfer so that the user has only one account in the correct organization in the enterprise. If this box is not checked, it is likely that the user is already inactive.

Once the user has selected both users for the transcript transfer, click "Transfer" in the top right. The user will be prompted to confirm this information, and then clicking "Transfer" again will complete the transcript transfer and copy completions from one user account to the other.

FAQs

Can I transfer a user's transcript from an unrelated organization?
No. This feature allows for enterprises to better manage user movement *within their own organizations or sub-portals.* Relias Client Care should still manage transcript transfers outside of an organization, and can do that as long as the request comes from an Admin or Supervisor.

If I do two transcript transfers for the same user, will it duplicate their completions?
No. Completions will not be duplicated if you have already transferred them in the past- only new completions will be transferred.

Is the Learner notified when I complete a transcript transfer?
No.

Does a user have to already have a user management role (e.g. Supervisor or Admin) to be made a Transcript Transfer Manager?
No. Any user can be made a Transcript Transfer Manager, regardless of primary user role. They can toggle between this role and their other roles like any other user role on the site.