



UCSF Continuing Education Portal



Transcripts Report

The Transcripts report allows users the ability to generate transcripts based on various criteria and filters.

This report is used by CE/CME administrators and accreditation staff to:

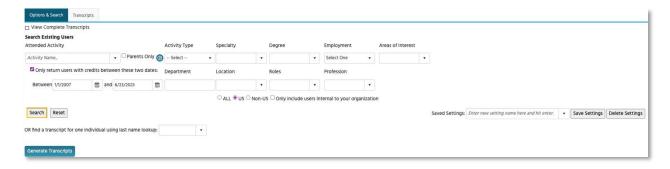
- View credits awarded for one or multiple activities for one or multiple learners
- Prepare transcripts for export or print for department files
- Prepare transcripts for export or print for learners

Accessing the Transcripts Report

- 1. Sign in to the CE Portal; scroll to the bottom to select **Administration**.
- 2. From the main menu, select **Reports**, then **Transcripts**.

Viewing Data

Select the appropriate filters and options on the **Options & Search** tab, then click **Search** or **Generate Transcripts** to generate the transcript report.



- 1. Search for your **Activity Name**, or search by **Activity Type**, learner **Specialty**, or **Degree**.
- 2. Select to view learners' Complete Transcripts or Only Credits Awarded within a Date Range.

| ☐ View Complete Transcripts | |
|---|--------------------|
| Search Existing Users | |
| Attended Activity | |
| Activity Name | → □ Parents Only |
| Only return users with credits between these two dates: | |
| Between 1/1/2007 | m and 11/11/2022 m |

Figure 1. Transcript Search Options

View Complete Transcripts (unchecked by default)

When running the transcript report for a specific activity, by default, the transcripts generated will only display the credits for the activity selected. To view the attendees' full transcripts when generating the report, check **View Complete Transcripts** first, then select the activity and any other criteria needed for the search.

Only return users with credits between these two dates (checked by default)

This option is checked by default. To view the transcripts for users regardless of credit between the dates listed, uncheck this option.

3. Filter by **Department**, **Location**, individual **Roles**, or **Profession** if needed or desired.



4. Filter by geography if desired by selecting one of the available options.

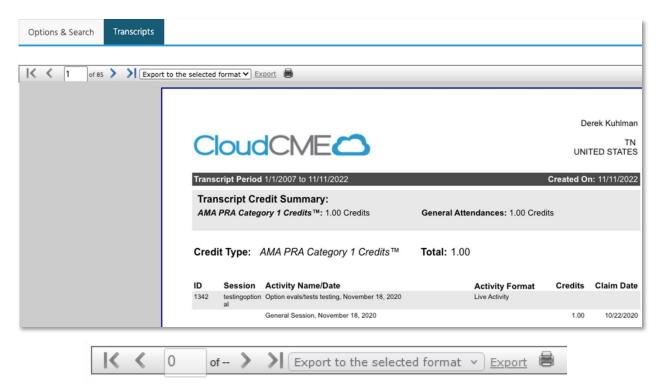


5. Click Search.

6. You can also find a transcript for a single learner by searching their name.

OR find a transcript for one individual using last name lookup:

The transcripts for individuals who meet the search criteria will be listed on the **Transcripts** tab.



Click **Export to the selected format** to select a format for downloading purposes. Click the **Export XLS** button to download an Excel spreadsheet or print the report by clicking on the print icon.