



## Transcript Downloads: Automated and Manual Procedures

The purchase of Automated Data Services (with an annual fee) provides your group with the benefits of auto login services and automated downloads of transcript data. (These services are available only to institutional groups.) The automated download service provides a gateway for an institution's server to automatically download transcript data of a group's personnel. This document describes procedures for Automated Transcript Data Downloads.

This document also describes all the options for an institutional Group Coordinator to access a group's transcript data (without additional fees). These options include viewing individuals' transcripts, generating transcript reports by course or by date, and manually downloading a transcript data file. This information is included to help an institution choose the best way/s for accessing personnel transcript data.

### A. OVERVIEW OF TRANSCRIPT DATA DOWNLOADS

1. All transcript downloads contain the entire data set of your transcript records; there is no downloading of partial data. Institutional groups have a link on the Group Coordinator Menu page (under the heading "Group Transcript Reports") for customizing the information included in downloaded transcript reports, whether generated manually or automatically:
  - a. Link: "Information Included in Reports"
    - i. Lists the fields (contact information and transcript data) which are included in your institution's reports (accessed manually or automatically) and identifies which of these are custom fields.
    - ii. Provides a link to select the data fields included in downloaded files.
    - iii. Provides a link to change the column names in downloaded files.
    - iv. Provides a link to update the column order in downloaded files.
  - b. The selection of the fields and the change of column names affect both the manual and automated downloads of transcript data. These features allow you to customize your downloaded files for the purpose of presenting the data in a meaningful way and helping to consolidate records from multiple training sources.
  - c. All data files are downloaded via https (a secure HTTP connection).

### B. AUTOMATED DOWNLOAD PROCEDURES

When a group has purchased automated data services, a link related to automated transcript data downloads is displayed on the Group Coordinator Menu page, under the heading "Group Transcript Reports". This link makes available the following functions:

1. Link: "View Report Key"
  - a. Provides the Report Key which the institution uses to download transcript data automatically.
  - b. Displays the date and time when a download was last completed (manually or automatically).
  - c. Provides a link to generate a new Report Key on demand.
  - d. Provides the URLs plus parameters (relating to format type and Report Key) which the institution can use to automatically download transcript data for the two types of data format:
    - i. Comma-delimited file
    - ii. Tab-delimited file
  - e. The downloaded file contains the same fields and column names as set via the link "Information Included in Reports".

## C. MANUAL PROCEDURES

1. **Individual Transcripts:** The Group Coordinator of an institutional group may access personnel transcript records.
  - a. An individual's transcript is available under two links on the Group Coordinators Menu page (under the heading "Members' Transcripts"):
    - i. "Group Roster and Transcripts"
    - ii. "Individual Member Transcripts"
  - b. For groups with large numbers of personnel (hundreds or more), the most efficient way to access the individual transcript records is to have two browser windows open and to use the above two links simultaneously.
    - i. In one window, view the group roster and determine whose transcripts you wish to view.
    - ii. In a second window, access the desired transcripts via the Individual Member drop-down list.
2. **Transcript Reports:** The Group Coordinator of an institutional group may generate transcript reports via the Group Coordinators Menu page (under the heading "Members' Transcripts"):
  - a. Link: "Search Transcripts by Course"
    - i. Select a course from a list of courses taken by members of your group. The list begins with titles of course series (e.g., ALAT Courses); you then select a course within a series. The only courses shown are those which have been taken by a member of your group.
    - ii. For the course selected, the ALL displays course usage and exam data for all individuals.
  - b. Link: "Search Transcripts by Date"
    - i. Enter a date range.
    - ii. For the date range entered, the ALL displays course usage and exam data for all individuals; includes all courses with transcript records for your group.
    - iii. The transcript data displayed are sortable by: name, course title, date course was accessed, exam date, and exam certificate ID.
3. **Manual Downloads:** The Group Coordinator of an institutional group may download comprehensive transcript reports via the Group Coordinators Menu page (under the heading "Group Transcript Reports"):
  - a. The Comprehensive Transcript Report is available in three data formats:
    - i. Comma-delimited file
    - ii. Tab-delimited file
    - iii. Excel spreadsheet file
  - b. The downloaded file contains the same fields and column names as set via the link "Information Included in Reports".