

MEA LEARNING EMPOWERS EnergyU

Upload Performance Evaluation Form (PEF) Completion Data to EnergyU

PEF Upload Instructions

March 2018



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User Profile Requirements for Successful Upload

A special field is provided in the **User Profile**.

The data in the **PEF User ID** field is required for a successful upload. This field must match the user's login name.

At the time this field was added, all existing users in the system had this field pre-populated with the user login information.

When adding new users, you will need to make sure to populate this field by copying the **Login Name** and pasting it into the **PEF User ID** field.

Active Deactivation Date: None

Leave Date

Login Name

Password

Confirm Password

First Name

Last Name

Email

Change Password at Next Login

Interface Language

Regional Locale Preference

Employee ID

Company ID

PEF User ID

*Company ID

The data in these two fields must match

Uploading PEF Completion Data to EnergyU

For administrators who would like to upload a spreadsheet for use in automatically granting performance evaluation certificates in EnergyU, the PEF User ID field in the user's profile must have the required data.

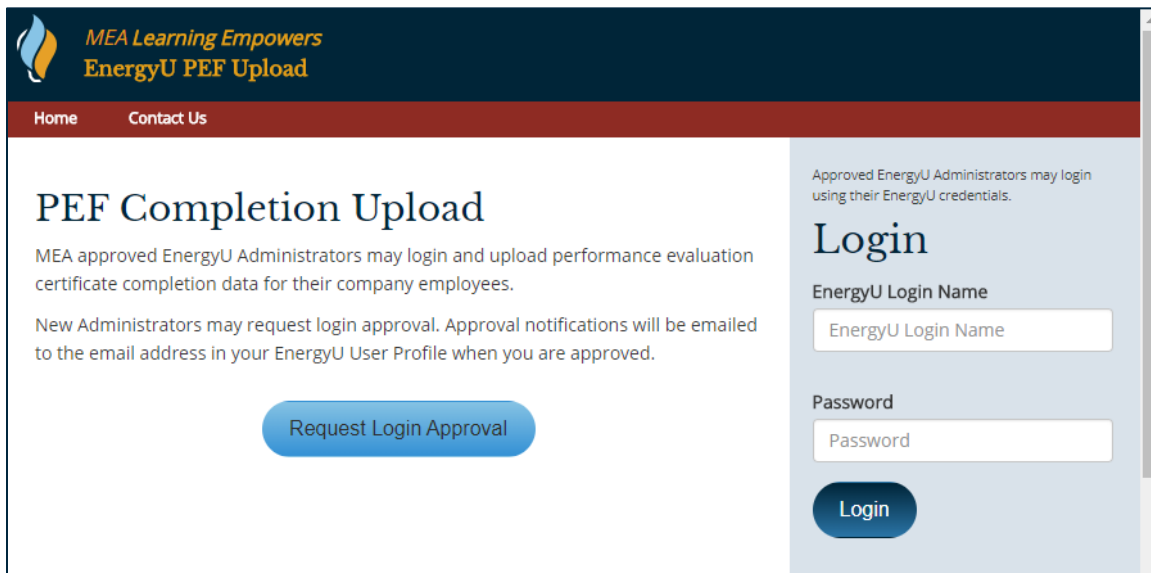
Copy the user's login name and paste it into the PEF User ID field - these values must match in order for the PEF upload to be successful.

The upload file can be created using the [Excel template](#), or the [EZval logfile](#) may be modified for uploading. The upload file must contain the six columns shown in the screen shot below.

	A	B	C	D	E	F
1	Company ID	Employee ID	Last Name	First Name	Certificate	Date Passed
2	ABFN	271	Bell	Joe	MEA149	11/1/2017
3	ABFN	271	Bell	Joe	MEA150	11/1/2017
4	ABFN	271	Bell	Joe	MEA151	11/1/2017
5	ABFN	271	Bell	Joe	MEA152	11/1/2017
6	ABFN	271	Bell	Joe	MEA153	11/1/2017
7	ABFN	926	Simms	Justin	MEA149	11/1/2017
8	ABFN	926	Simms	Justin	MEA150	11/1/2017
9	ABFN	926	Simms	Justin	MEA151	11/1/2017
10	ABFN	926	Simms	Justin	MEA152	11/1/2017
11	ABFN	926	Simms	Justin	MEA153	11/1/2017

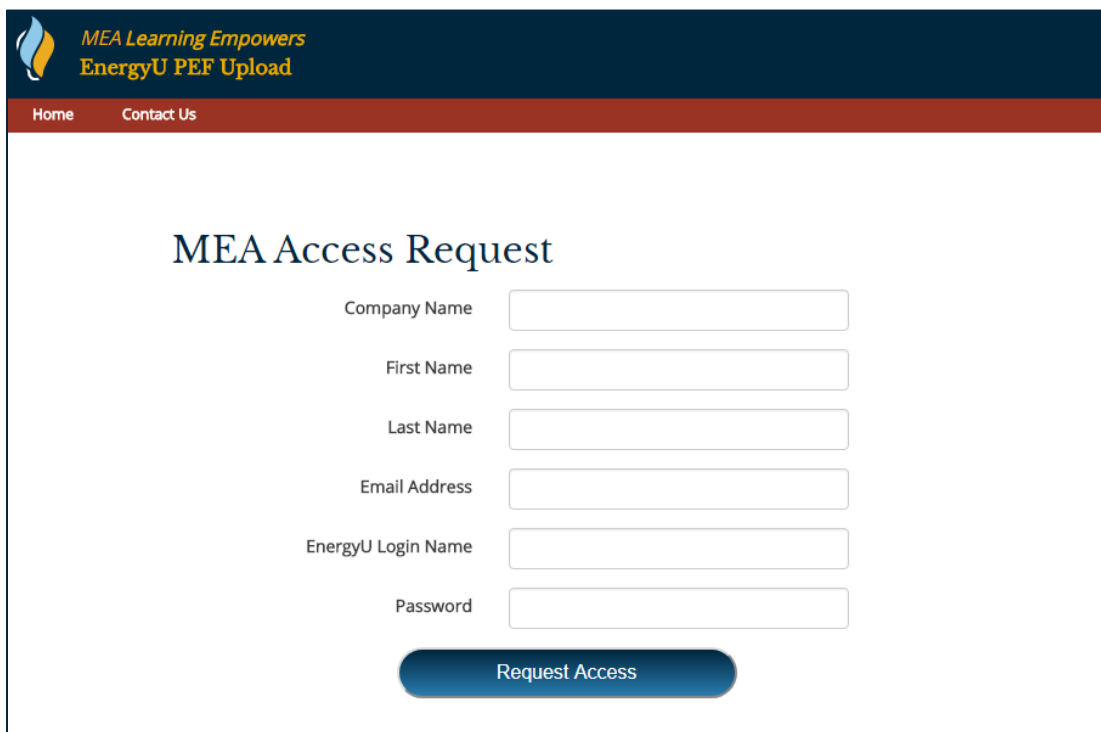
To gain access to the upload site, you must complete an initial login approval request.

1. Go to <http://www.econfirm.org/pef-upload>
2. Click the Request Login Approval button.



The screenshot shows the top of the website with the logo and navigation links. The main content area is titled "PEF Completion Upload" and contains two paragraphs of text. A blue button labeled "Request Login Approval" is centered below the text. On the right side, there is a "Login" section with a heading, a note about approved administrators, and input fields for "EnergyU Login Name" and "Password", followed by a "Login" button.

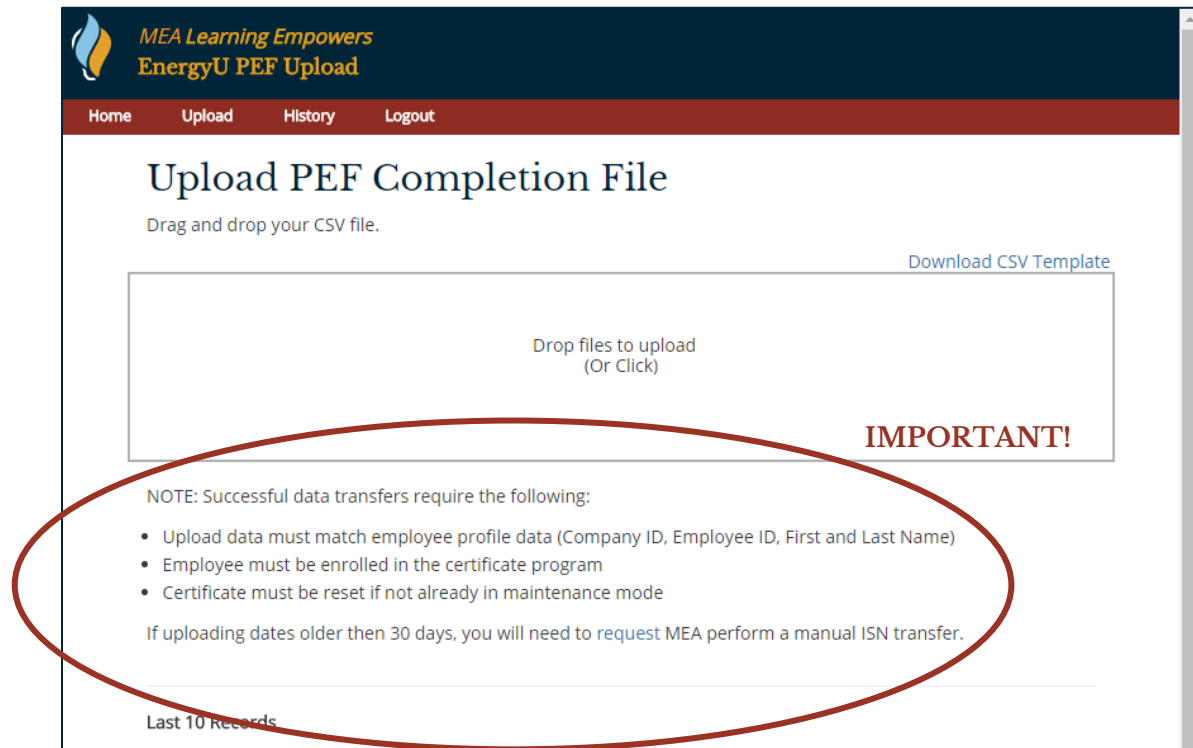
3. Enter the required MEA Access Request information and click the Request Access button.



The screenshot shows the "MEA Access Request" form. It includes a heading, a logo, and navigation links. The form consists of several input fields: "Company Name", "First Name", "Last Name", "Email Address", "EnergyU Login Name", and "Password". A blue button labeled "Request Access" is positioned at the bottom of the form.

Once you have login approval, you can login and upload your user PEF completion data file.

1. Go to <http://www.econfirm.org/pef-upload>
2. Login using your EnergyU credentials.
3. If desired, you can click the **Download CSV Template** link and use the template to create a new upload file.
4. Drag your CSV file and drop it in the upload area of the screen, or click in the upload area and browse to the file location.



A successful upload will not only grant the certificate, but will also display the PEF in the credits by user report. PEFs listed will not have a score or earn course credits, but will display a passed status with the date earned. (See sample credits by user report screen shot below.)

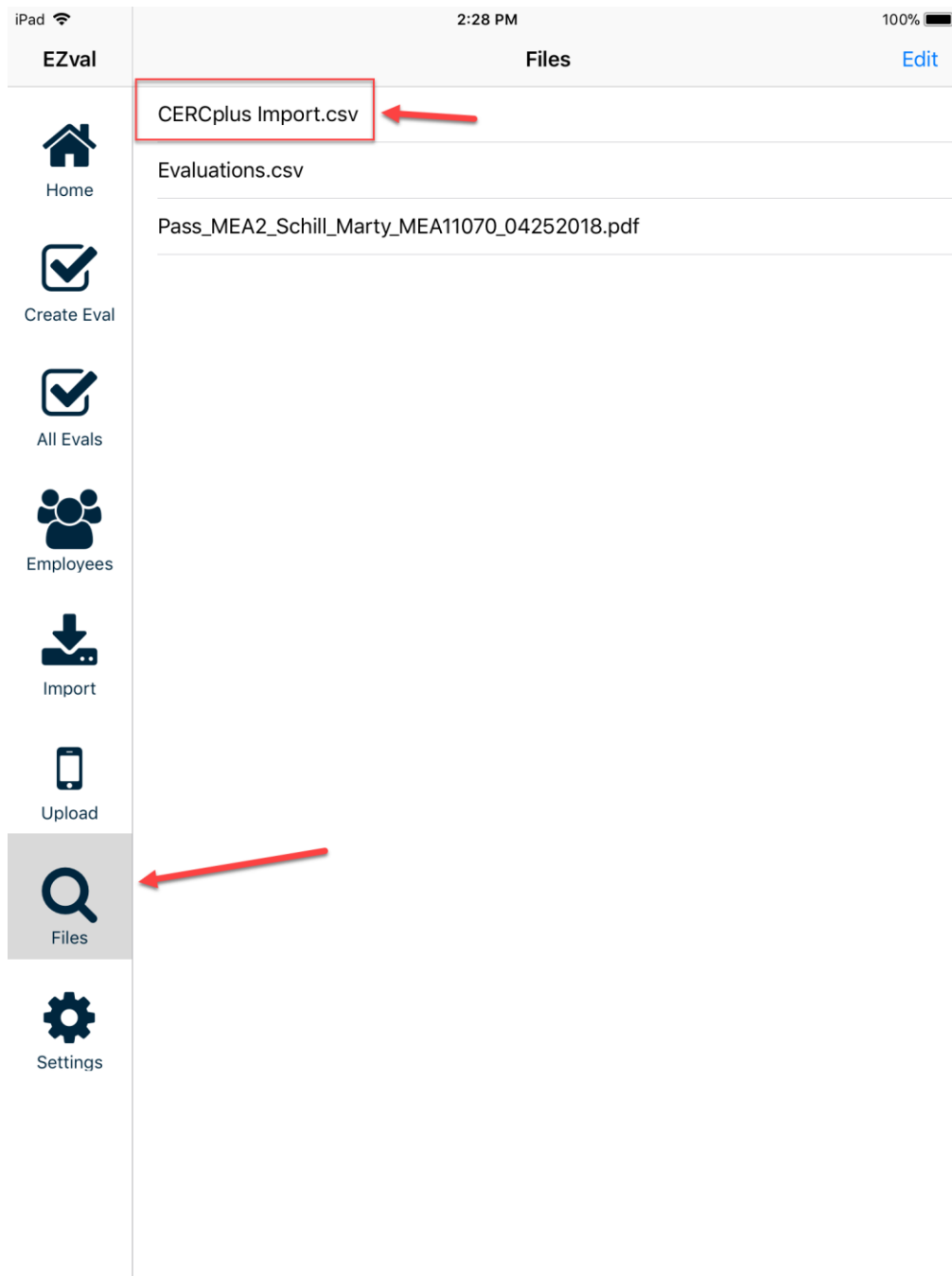
Course Name	Score	Passed	Credits Earned		Date Credit
192-1201.01 Leakage Survey: Distribution and Transmission PEF Course	Not Available	Yes	Course Credits	0.00	11/1/2017
192-1201.02 Leakage Survey: Distribution and Transmission PEF Course	Not Available	Yes	Course Credits	0.00	11/1/2017
192-1202 Outside Gas Leakage Investigation, Pinpointing, and Grading PEF Course	Not Available	Yes	Course Credits	0.00	11/1/2017
192-1203 Inside Gas Leakage Investigation PEF Course	Not Available	Yes	Course Credits	0.00	11/1/2017
192-1301.01 Leak & Strength Test - Service Lines, Mains, and Transmission Lines PEF Course	Not Available	Yes	Course Credits	0.00	11/1/2017
195-0060 (CT60) e-TNG General Abnormal Operating Conditions	100%	Yes	Course Credits	1.00	8/3/2017
195-0060 (CT60) KNT General Abnormal Operating Conditions	94%	Yes	Course Credits	1.00	8/3/2017

Records that fail to upload will display at the bottom of the screen. To view all records, click the History button at the top of the screen. Possible reasons for an unsuccessful upload include:

1. User not enrolled in the certificate program.
2. User's login name does not match the PEF User ID field.

Creating the PEF upload file (iOS version)

The iOS version of EZval requires you to use the "CERCplus Import.csv" file. This file does not require any alteration before being uploaded to the PEF uploader.



Creating the PEF upload file (Windows version)

The EZval logfile contains nine columns, and the PEF upload file only requires six columns. If you used the default directory location during install, the EZval logfile will be located on your hard drive here:

C:\MEA\EZval Performance Evaluation System\EZval Records\EZval Passed Records

Make a copy of the Pass_EZval_Records_File.csv file that contains the data for your passed PEF records. Modify the copy by removing columns A, H, and I. The only columns that should remain are the Comp ID, User ID, Last Name, First Name, PEF Ident, and Date.

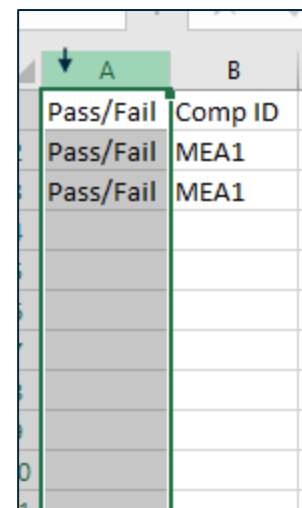
	A	B	C	D	E	F	G	H	I
1	Pass/Fail	Comp ID	User ID	Last Name	First Name	PEF Ident	Date	EVID	Sig
2	Pass	PTSI	XX5427	Cullen	Michael	MEA11	1/15/2016	123456	
3	Pass	MEA1	1234	Joint	Frank	MEA110	5/18/2016	1	
4	Pass	MEA1	1234	Joint	Frank	MEA110	5/18/2016	1	
5	Pass	MEA1	1234	Joint	Frank	MEA110	5/19/2016	1	
6	Pass	MEA1	1234	Joint	Frank	MEA110	5/18/2016	1	
7	Pass	MEA1	1234	Joint	Frank	MEA110	5/17/2016	1	

IMPORTANT: If the possibility exists that an Employee ID may start with a zero, you must use a [special procedure](#) for opening the logfile in Microsoft Excel. If this procedure is not followed, the leading zeros will be dropped when the file is opened; this will cause the upload to fail.

Deleting Columns in Excel

This procedure may be used to delete rows from your EZval logfile once the file is opened in Microsoft Excel. There are a lot of tutorials and videos available online for help with Microsoft Excel.

1. Place your cursor over the "A" in the first column. The cursor will turn into a down arrow.
2. Click and the entire column will be highlighted.
3. Right-click in the highlighted and select Delete from the popup menu.
4. Repeat for other columns you wish to delete.

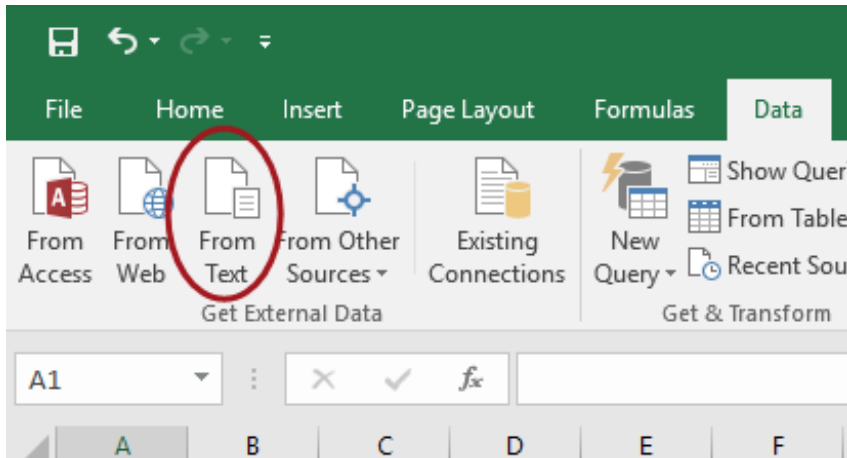


Special Instructions

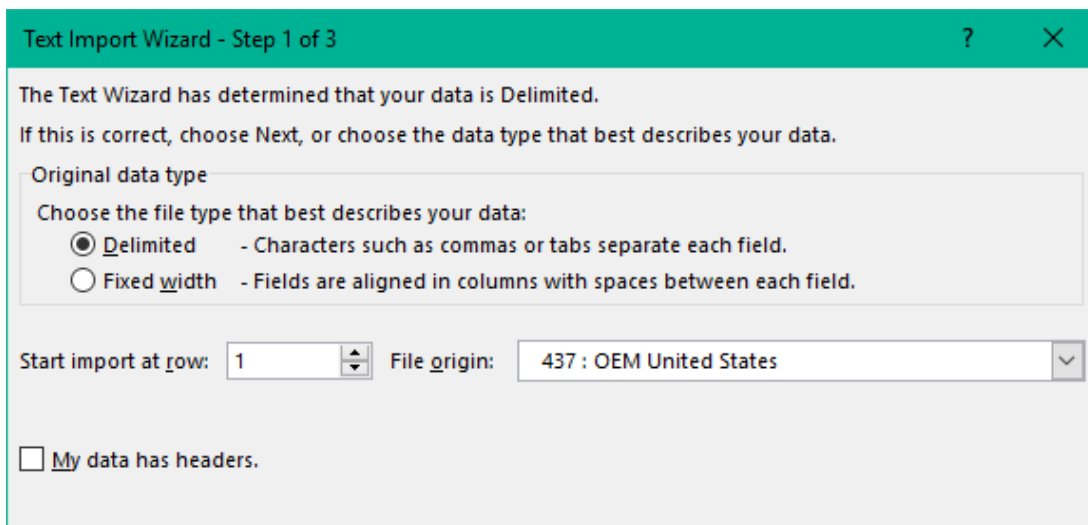
Prevent dropping of leading zeros when opening the EZval logfile in Microsoft Excel

This procedure only needs to be used when you have a field in your spreadsheet that starts with a zero. If none of your employee IDs start with zero, you should be able to open your CSV file normally.

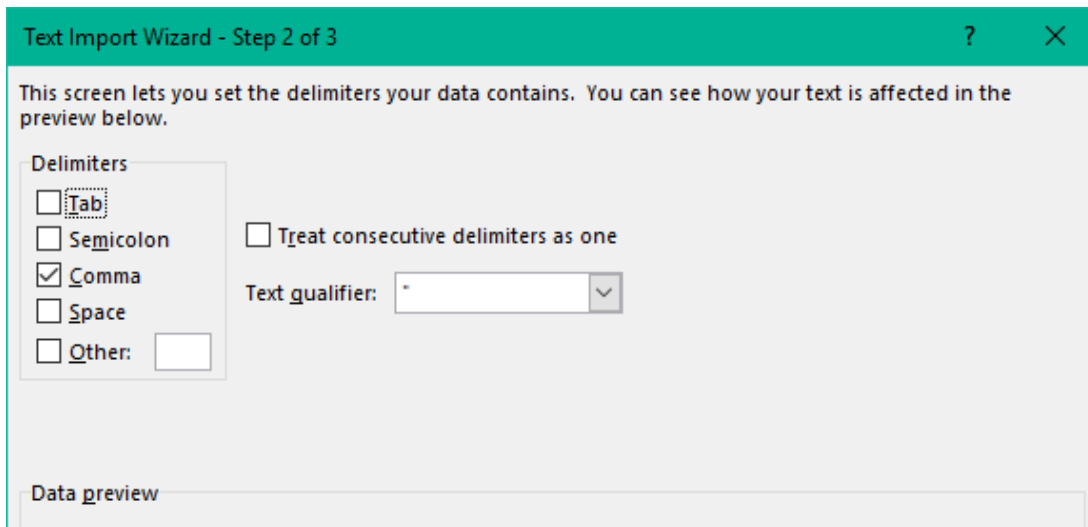
1. Launch Microsoft Excel and select Blank workbook to open a new worksheet.
2. Select the **Data** tab.
3. Click on the **From Text** button in the **Get External Data** section.



4. In the **Import Text File** window that opens up, browse to the EZval logfile that contains the data you wish to import.
5. Select the desired file and then click the **Import** button.
6. Within the **Text Import Wizard – Step 1 of 3** window, select the **Delimited** radio button.



7. Click the **Next** button.
8. Within the **Text Import Wizard – Step 2 of 3** window, select **Comma** (uncheck **Tab**) as the delimiter.



9. Click the **Next** button.
10. In the **Data Preview** area of the **Text Import Wizard – Step 3 of 3** window, select the **User ID** column, and then check the **Text** radio button in the **Column data format** area. This will format the column as text instead of numerals, and the leading zeros will not be dropped when imported.
11. Click the **Finish** button to import the file.
12. In the **Import Data** window, putting the data in the first cell of the first column (**Existing worksheet: =\$A\$1**) is fine, so click the **OK** button.

