EECP User Guide- Compressed File Enrollment Upload

Enrollment Upload How To

The Compressed File Enrollment Upload is a zipped folder that has a file for each type of data that needs to be loaded into EECP. The only files that are required to create an application workflow step are the Enrollment file and the Measures file.

Downloading the Compressed File Enrollment Upload Template

- 1. Hover over the Main Menu and select "Upload".
- 2. Select "Compressed File" in the Upload Type dropdown list.
- 3. Click the "Download Template" button.

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Upload Type Compressed File 🔻 🗲	Upload Select	
pload Type Description		

4. The Download Compressed File Template dialog will open.

Download Compressed File Template	×
Program	
(Click to Select)	
Program Year (Click to Select)	•
Download	

- 5. Select the Program and the Program Year.
 - a. By selecting a program and program year, the upload templates will be customized with the enrollment field options and the measure properties that are specific to the program.
- 6. Click the "Download" button.
- 7. A zipped folder will open with all the files. It will be saved to your Downloads folder. You may save the files anywhere on your computer.

Name	Туре
ESG_Template_EECP_EnrollmentMeasures_20150518124056	Microsoft Excel Comma Separated Values File
ESG_Template_EECP_Enrollments_20150518124056	Microsoft Excel Comma Separated Values File
ESG_Template_EECP_Header_20150518124056	Microsoft Excel Comma Separated Values File
ESG_Template_EECP_Invoice3rdParty_20150518124056	Microsoft Excel Comma Separated Values File
ESG_Template_EECP_InvoiceLineItem_20150518124056	Microsoft Excel Comma Separated Values File
ESG_Template_EECP_InvoicePayment_20150518124056	Microsoft Excel Comma Separated Values File
ESG_Template_EECP_InvoicePaymentRequest_20150518124056	Microsoft Excel Comma Separated Values File

Completing the Compressed File Enrollment Upload Template

- 1. Open the "ESG_Template_EECP_Enrollments" file and the "ESG_Template_EECP_EnrollmentMeasures" file.
- 2. Complete the required information. You may use the specifications attached here to determine which fields are required:
 - a. Example: Multi Insulation enrollment specification (be sure to include this in the file name: **EECP_Enrollments_**):



Multi Insulation Enrollment Spec b. Example: Multi Insulation measures specification (be sure to include this in the file name: **EECP_EnrollmentMeasures_**):



Multi Insulation Measures Spec

c. Example: Duct Seal enrollment specification (be sure to include this in the file name: **EECP_Enrollments_**):



d. Example: Duct Seal measures specification (be sure to include this in the file name: **EECP_EnrollmentMeasures_**):



Duct Seal Measures Spec

- 3. After you finish completing the Enrollment and Measures files, send them to one zipped folder by following these steps:
 - a. Select both files
 - b. Right click one of the selected files and click "Send To"
 - c. Click "Compressed (zipped) folder"

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Downloads (2)	ECP_Enrollments_Multi_Insulation_Mea	5/18/2015 10:37 AM Microso	oft Excel C 1 KB	
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2 items selecte	d Date modified: 5/18/2015 10:37 AM Date Size: 1.79 KB	: created: 5/18/2015 10:37 AM		

Uploading the Compressed File Enrollment Upload Template

- 1. Hover over the Main Menu and select "Upload".
- 2. Select "Compressed File" in the Upload Type dropdown list.
- 3. Click the "Select" button to find the file you would like to upload.

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In the second s	Template	
Upload Type Compressed File 🔻 🗲	Upload Select	_
	Upload File	
Upload Type Description		

4. If the file you selected passed format validation, a green icon will be displayed. The files cannot be open on your computer while they are uploaded. In that case, a red icon will be displayed. When this happens, close the files and select them again.

Enroliment Upload		
গ্রি View Error Logs 陷 Download Tem	plate	
Upload Type Compressed File ▼	Upload EECP_Enrollments_Multi_Insulation_Measures.zip × Remove	
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pload Type Description		

- 5. The import results will display as the file is being uploaded.
 - a. Successful Enrollments The number of enrollments successfully created will be displayed. Click on the link to view the Reference Number for the file and the corresponding Enrollment Number.

- b. Failed Enrollments The number of enrollments that failed to create will be displayed.
 Click the link to view the Reference Number of the enrollment. The Error Message section at the bottom will display the detailed error.
- c. Hide Warnings? The checkbox can be selected to view only the errors that caused data to not load.

ile Upload Detail				
Date Uploaded: 5/18/2015 2:27:33 PM	File Name: EECP Enrollments	Multi Insulation Measures.zi	D	Status: Complete
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