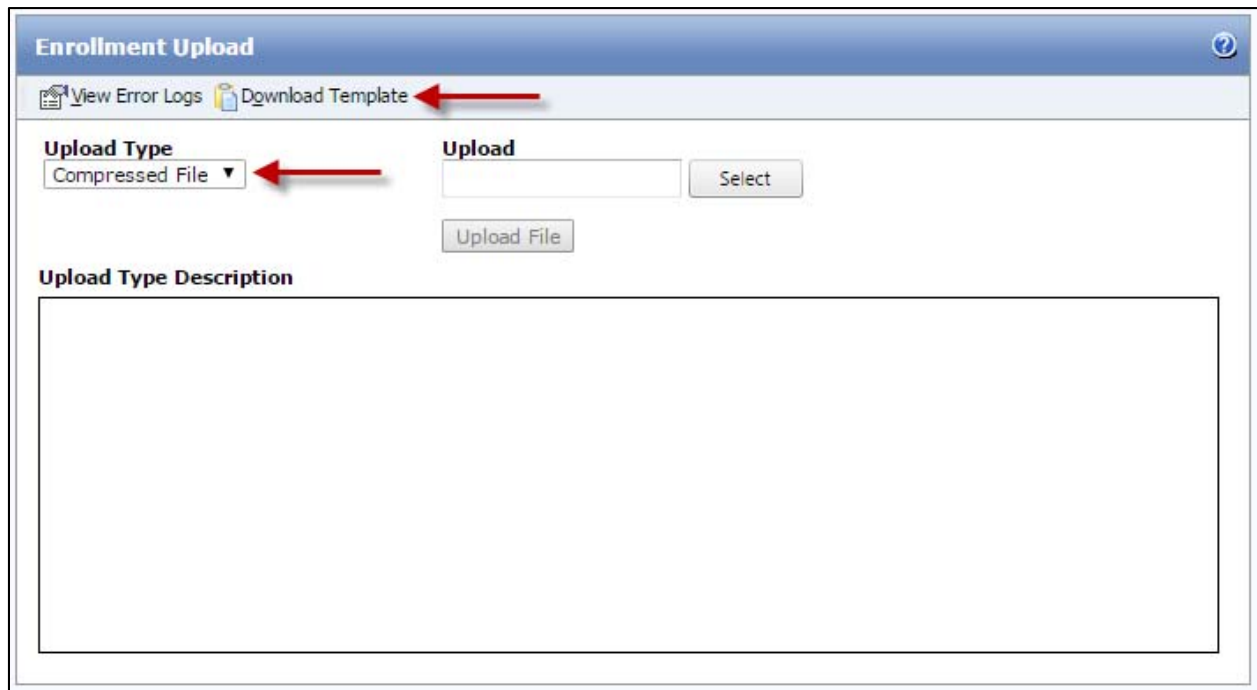# EECP User Guide- Compressed File Enrollment Upload

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.

4. The Download Compressed File Template dialog will open.

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	Type
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_**):

Duct Seal
Enrollment Spec

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"
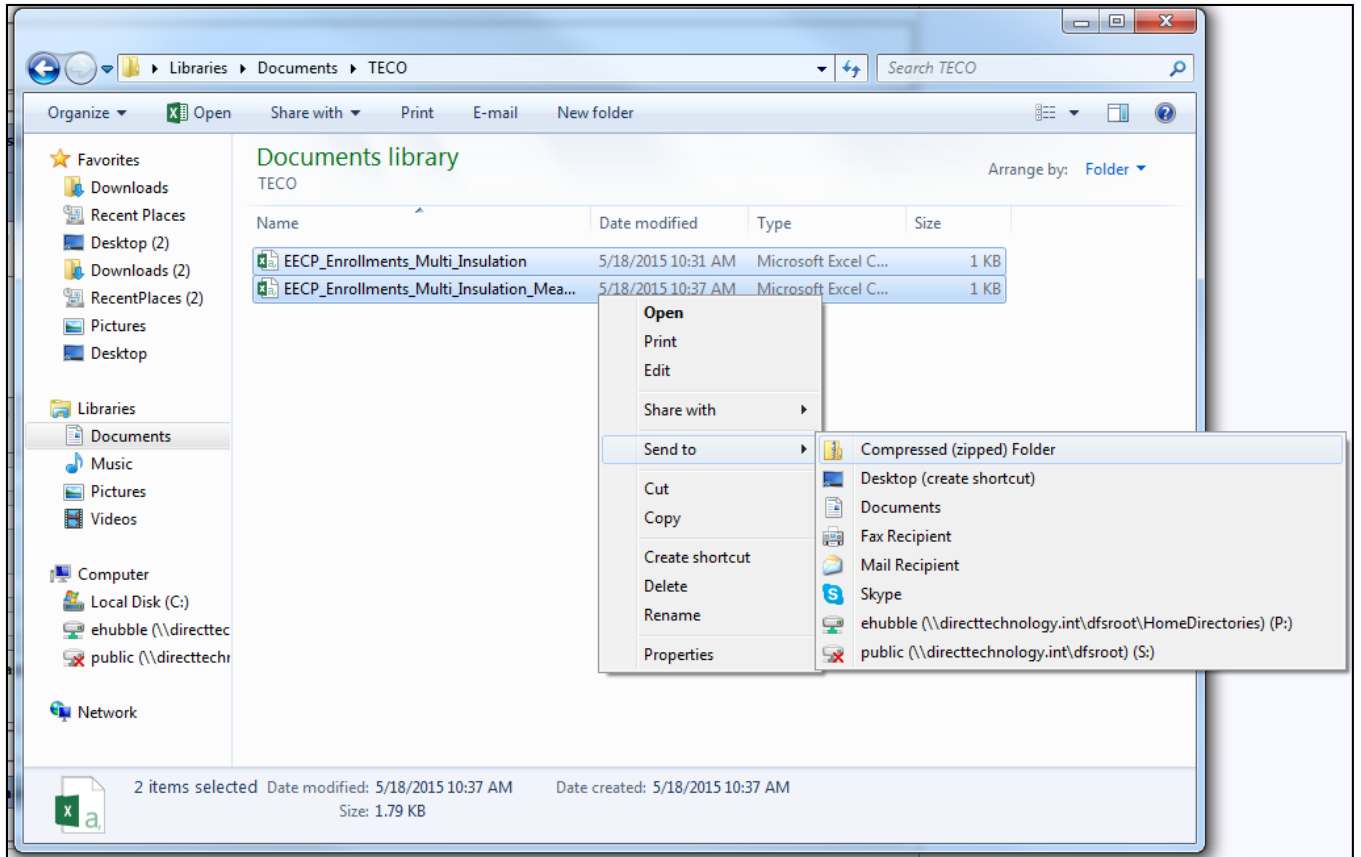
Uploading the Compressed File Enrollment Upload Template

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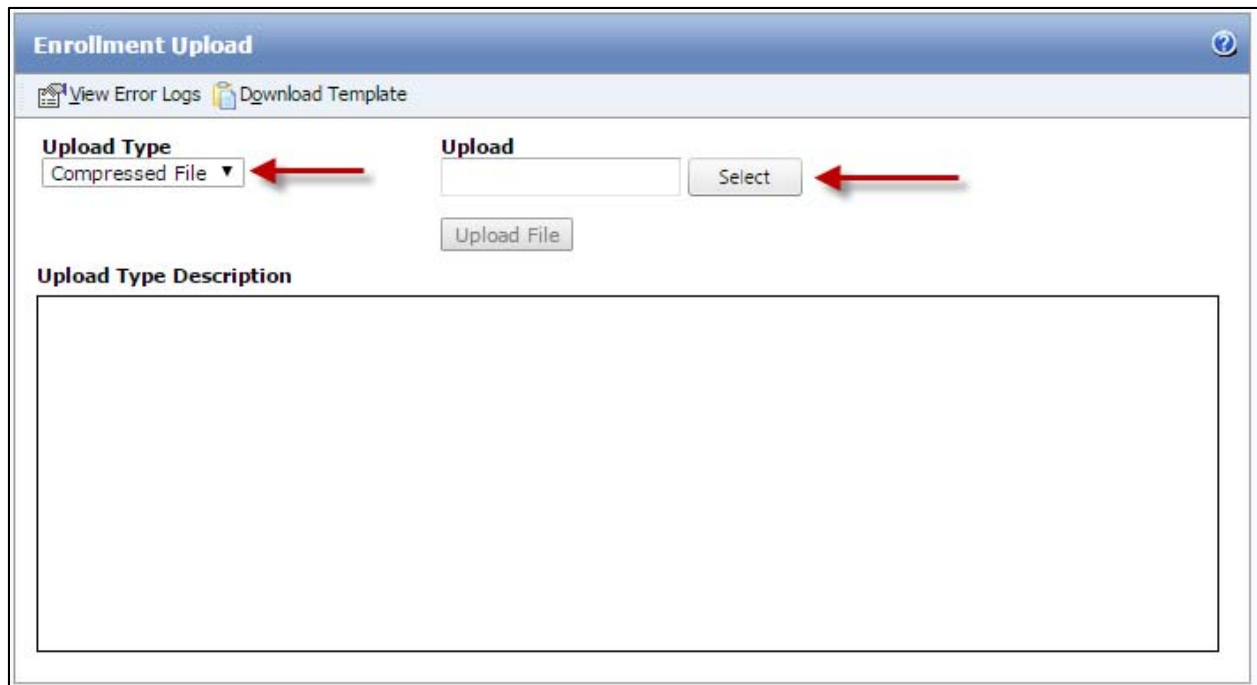
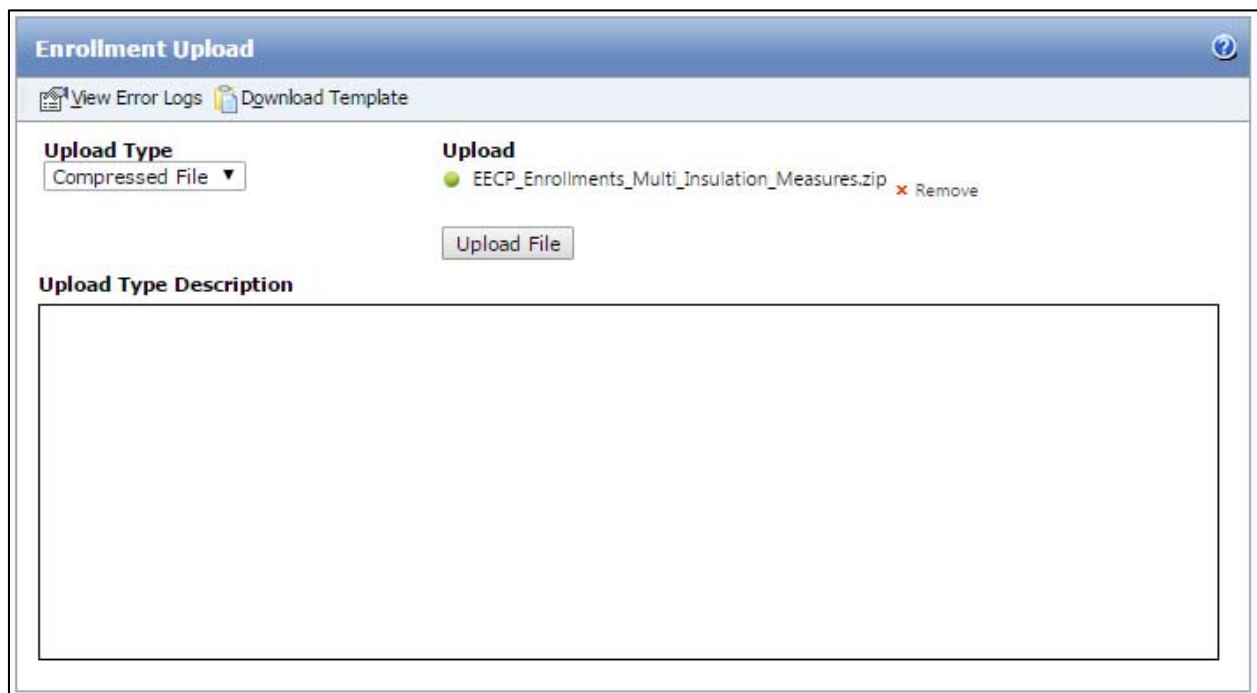4. If the file you selected passed format validation, a green icon will be displayed. The files cannot be open on your computer while they are uploaded. In that case, a red icon will be displayed. When this happens, close the files and select them again.

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.

Service Import Log

⚙ Upload Files   ⬅ Close   📊 Export to Excel   📄 Download File

File Upload Detail

| **Date Uploaded:** | **File Name:** | **Status:** |
| 5/18/2015 2:27:33 PM | EECP_Enrollments_Multi_Insulation_Measures.zip | **Complete** |

| **Control Date:** | **Control Number:** | **Hide Warnings?** |
| 5/18/2015 2:27:33 PM | ments_Multi_Insulation_Measures.zip_20150518142733 | ☐ |

Enrollment Details

Program Name	Total Records	Successful Enrollments	Failed Enrollments	Create Date
Multi Insulation - Residential	1	1	0	5/18/2015 2:27:46 PM

Date Logged	Warning/Error Message
No records to display.	

⏮ ◀ 1 ▶ ⏭   Page: 1 of 1 Go   Page size: 25 Change   Item 0 to 0 of 0