

Transcript File Configuration/Upload Job Aid Continuing Education Templates for the New SOCCED

This job aid assumes the user has a basic understanding of Microsoft Excel switchology and tools.

There are two methods: (1) [Starting with an Excel native file type](#) and (2) [Starting with a CSV file format in Excel](#). Click on the desired method to view the steps involved.

Method 1: Starting with the Excel native file type.

1). Follow the link below and you will arrive at the page displayed in Figure 1. Click on the SOCCED CSV Master.xlsx file to download and save the file to a location of your choosing.

<https://soccedsupport.zendesk.com/hc/en-us/articles/115004502903-SOCCED-CEH-Transcript-Upload-File>

The screenshot shows the NERC SOCCED Help Center interface. At the top left is the NERC logo. At the top right are navigation links: 'SOCCED | Submit a SOCCED ticket | Status of a SOCCED ticket | NERC CE Events' and a 'Sign in' button. Below the navigation is a search bar with the placeholder text 'How may I help you?'. The main content area is titled 'SOCCED CEH (Transcript) Upload File' and includes a 'Follow' button. The article is authored by 'NERC CE Coordinator' and was updated 4 minutes ago. The text of the article reads: 'Excel template to upload CEH to transcripts. Please see job aide.' Below this text are two download links: 'SOCCED Excel Master.xlsx' and 'SOCCED CSV Master.csv'. The 'SOCCED CSV Master.xlsx (20 KB)' link is highlighted in yellow. Below the download links is a 'Was this article helpful?' section with a thumbs up/down icon and a count of '0 out of 0 found this helpful'. To the right of the article are two sections: 'RELATED ARTICLES' with a list of links including 'CSV Version of ILA for SOCCED', 'SOCCED Introduction Webinar', 'New SOCCED Update', 'Personnel Subcommittee Minutes', and 'How do I find out the new CE fee schedule?'; and 'RECENTLY VIEWED ARTICLES' with a link to 'Important Notice to Review Transcripts'. At the bottom left of the article is a 'Comments' section showing '0 comments'. Social media sharing icons for Facebook, Twitter, LinkedIn, and Google+ are located at the bottom right of the article content.

Figure 1. Screen capture of templates (highlighted) at hyperlink listed above.

2). Open the file (Figure 2).

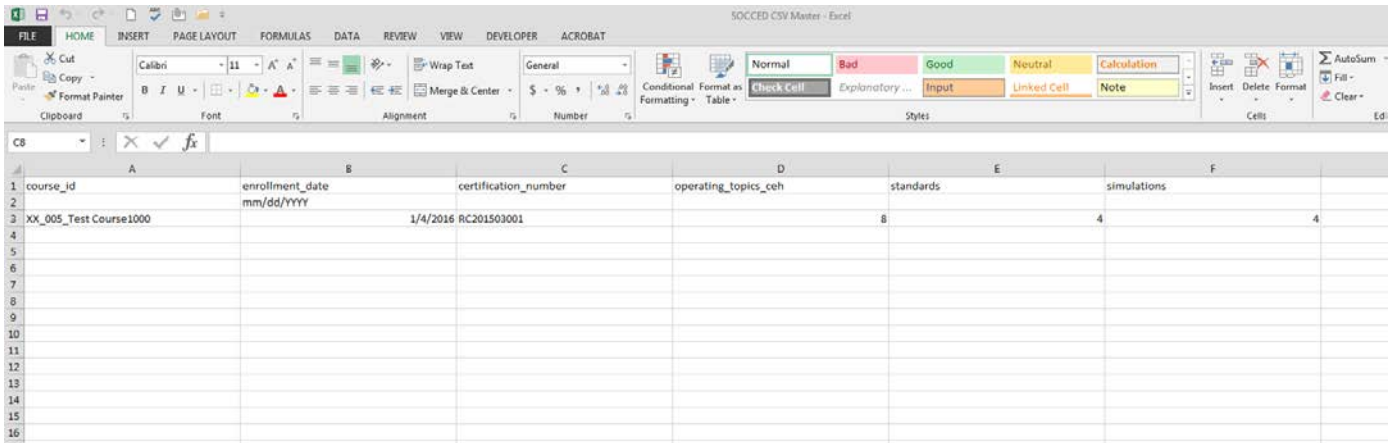


Figure 2. Open the XLSX template.

3). Fill in the appropriate data under each column heading (Figure 2). Ensure that all cells for each record are completed and in the original format paying particular attention to Column B to ensure it is in the date format as mm/dd/yyyy (Figure 3). Do not change the column heading and data locations as this will cause errors during upload.

The screenshot shows an Excel spreadsheet with the following data:

enrollment_date	certification_number	operating_topics_ceh	standards
mm/dd/YYYY			
1/4/2016	RC201503001		8

The 'Format Cells' dialog box is open, showing the 'Date' category selected. The 'Type' list includes the following options:

- *3/14/2012
- *Wednesday, March 14, 2012
- 3/14
- 3/14/12
- 03/14/12
- 14-Mar
- 14-Mar-12

The 'Locale (location)' is set to 'English (United States)'.

Figure 3. Format Column B.

4). Right click on Row 2 and click the “Delete” button (Figure 4). When the delete dialogue box pops up, be sure to select the “Entire row” radial button. The entire row must be deleted and not just cleared or hidden/residual characters will cause an error during upload to SOCCED (Step 9).

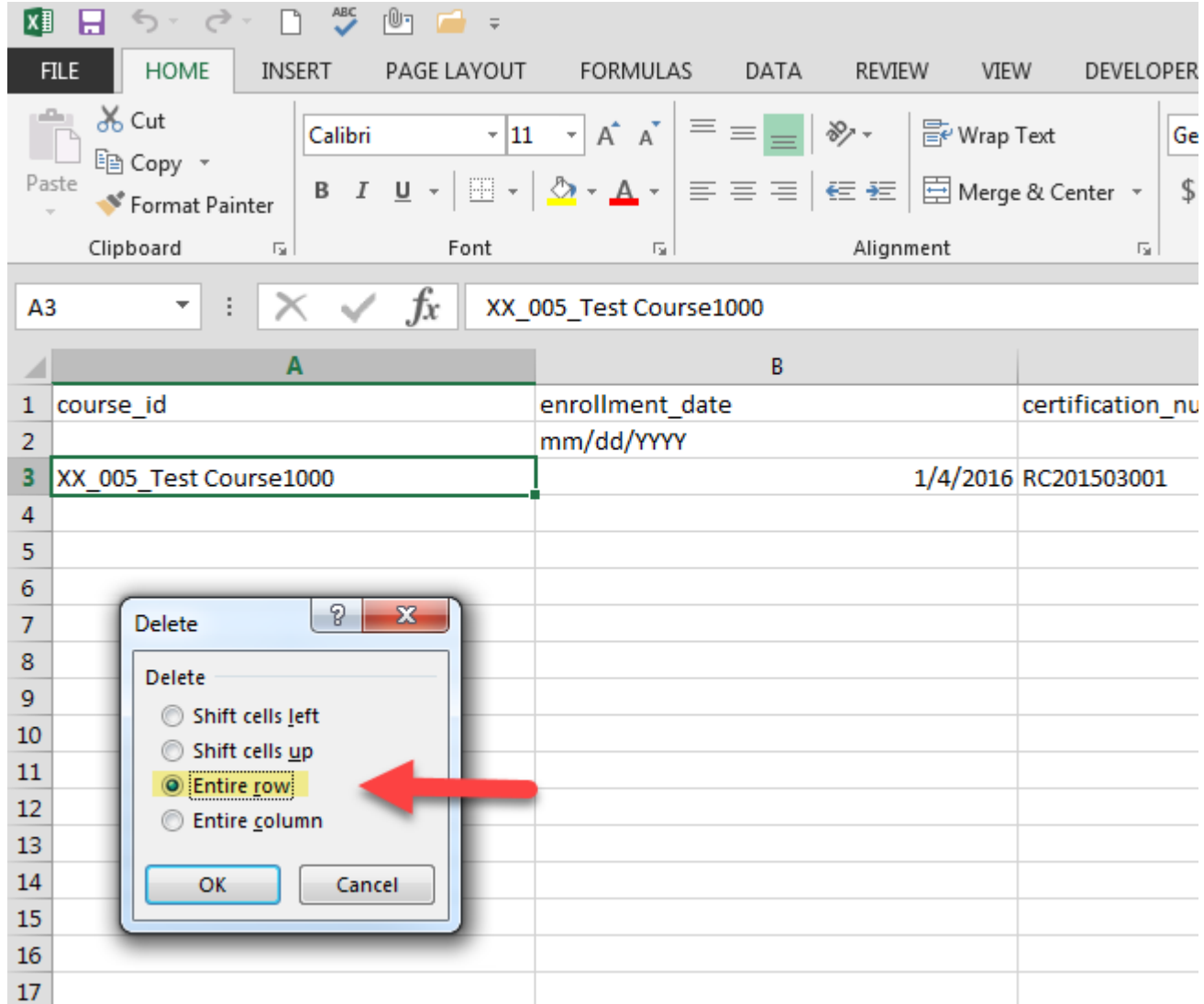


Figure 4. Delete Row 2 sample record.

5). Save the file as a CSV (Comma delimited) file type (Figure 5).

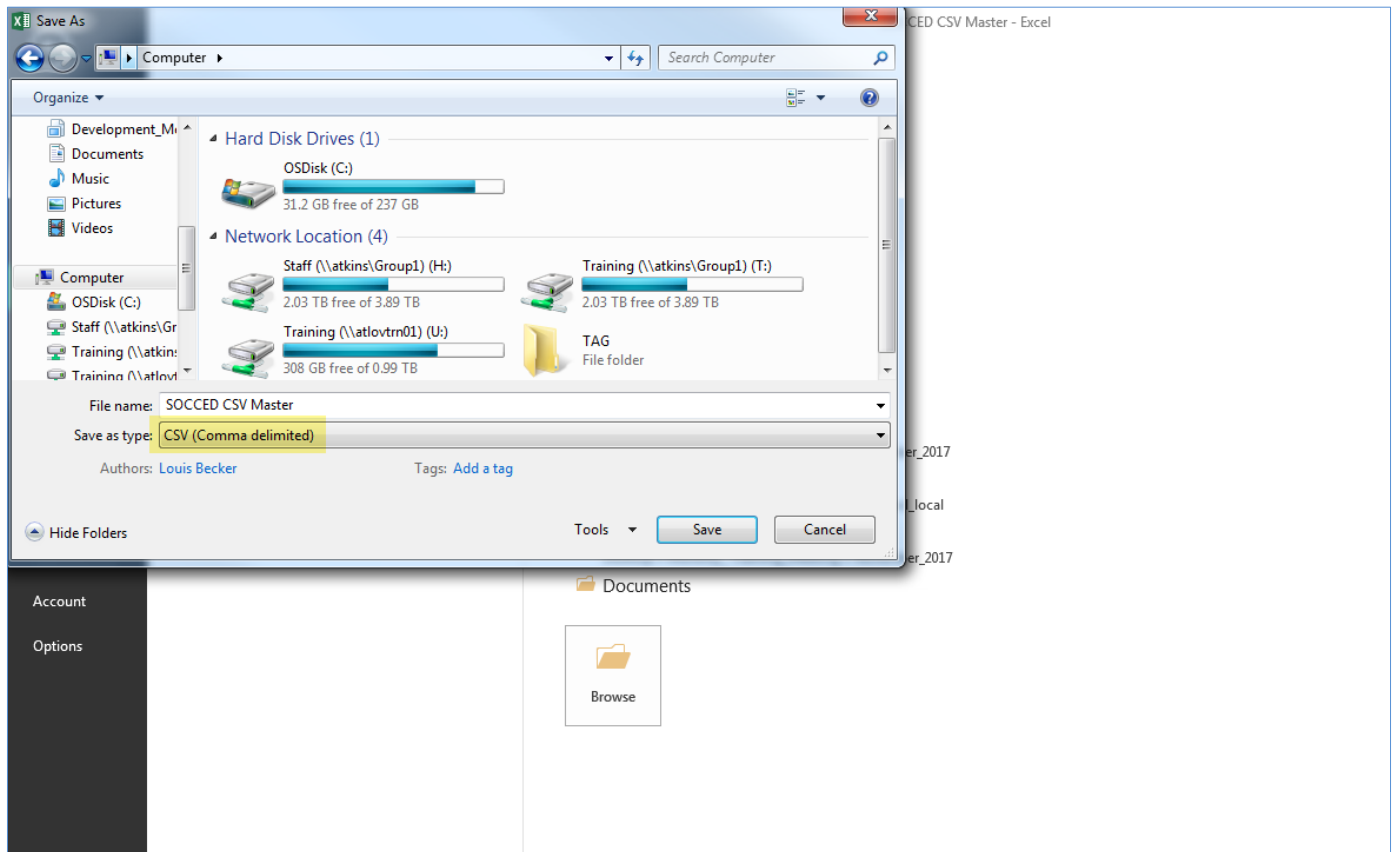


Figure 5. Save the file as a CSV (Comma delimited) file type.

6.) Follow the prompt/dialogue box, answering yes to the dialogue box question (Figure 6).

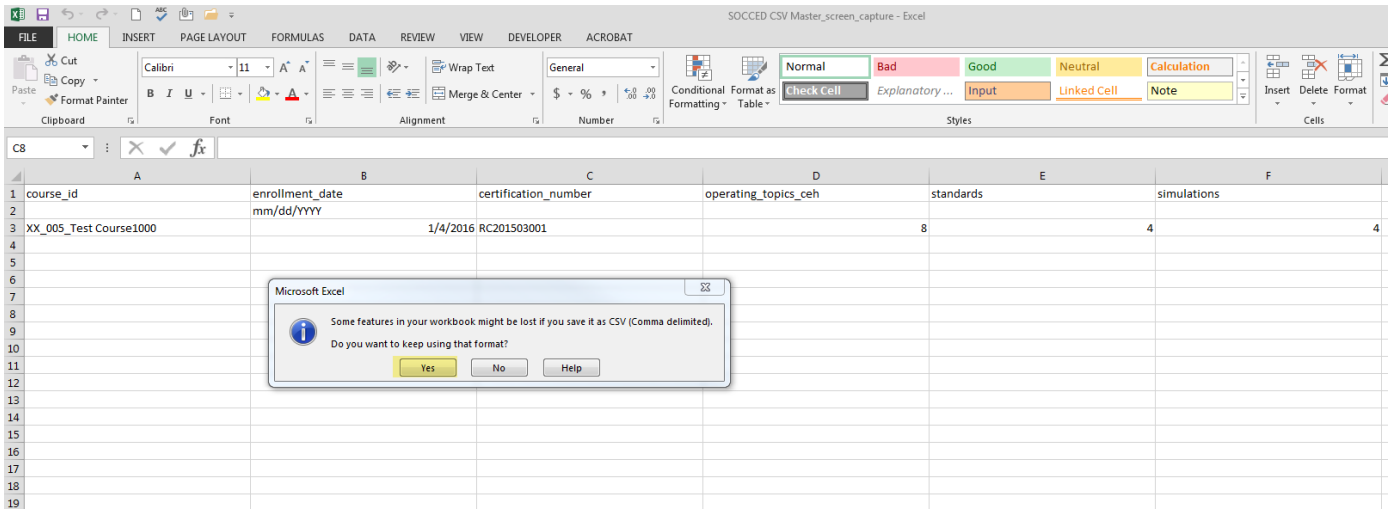


Figure 6. Answer yes.

7.) Close the application and answer “Don’t Save” to the dialogue box question (Figure 7).

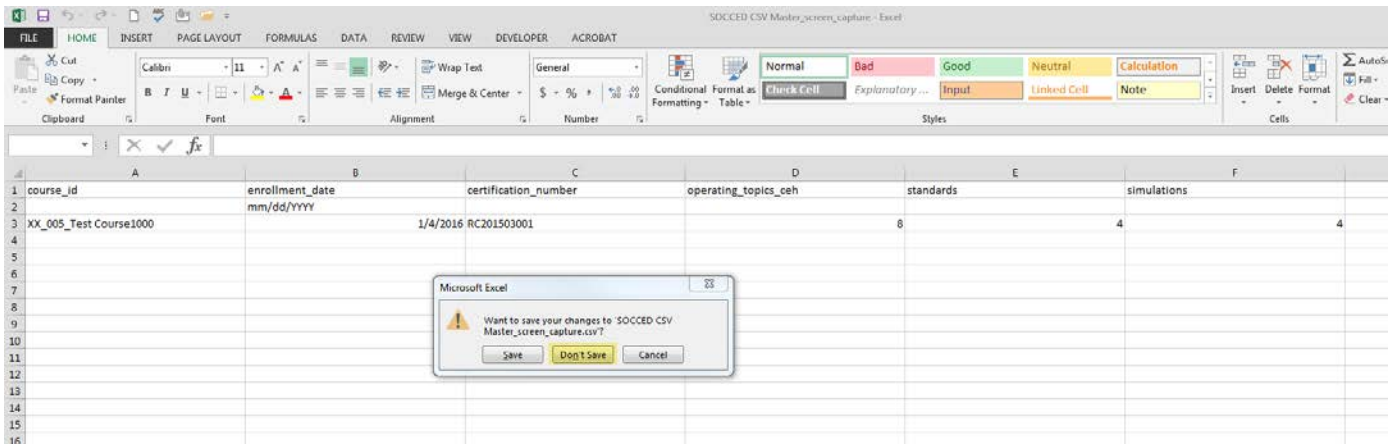


Figure 7. Close the file and answer “Don’t Save.”

8). Reopen the file to ensure all formats remained as required. Close the file and proceed to Step 9.

9). Upload the file to SOCCED (see Figures 8-11).

a.) Select “CEH upload (CSV)” from lower left of the login page.

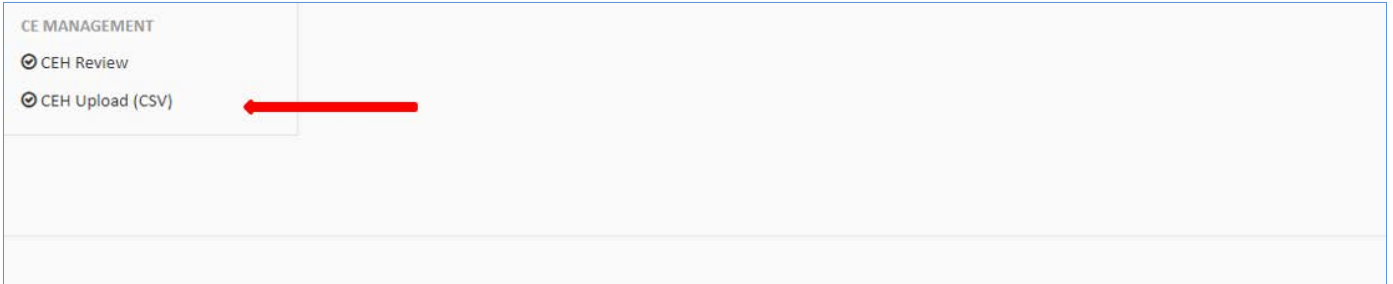


Figure 8. Select CEH upload.

b.) Choose the CSV file from the saved location by clicking on the “Choose File” button.

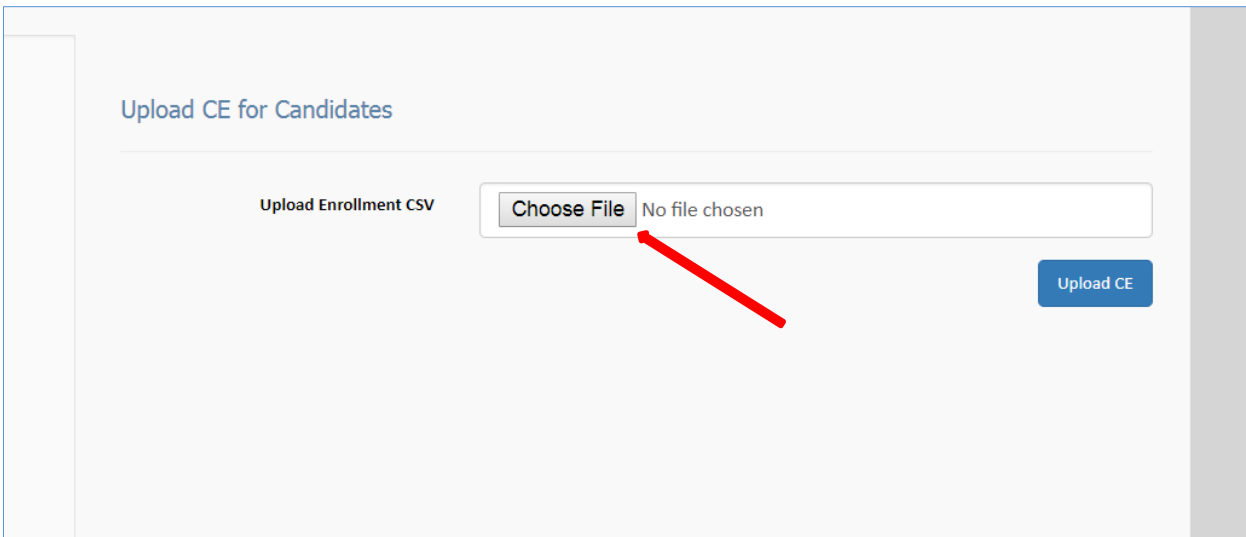


Figure 9. Choose the CSV file.

c.) Click on the “Upload CE” button.

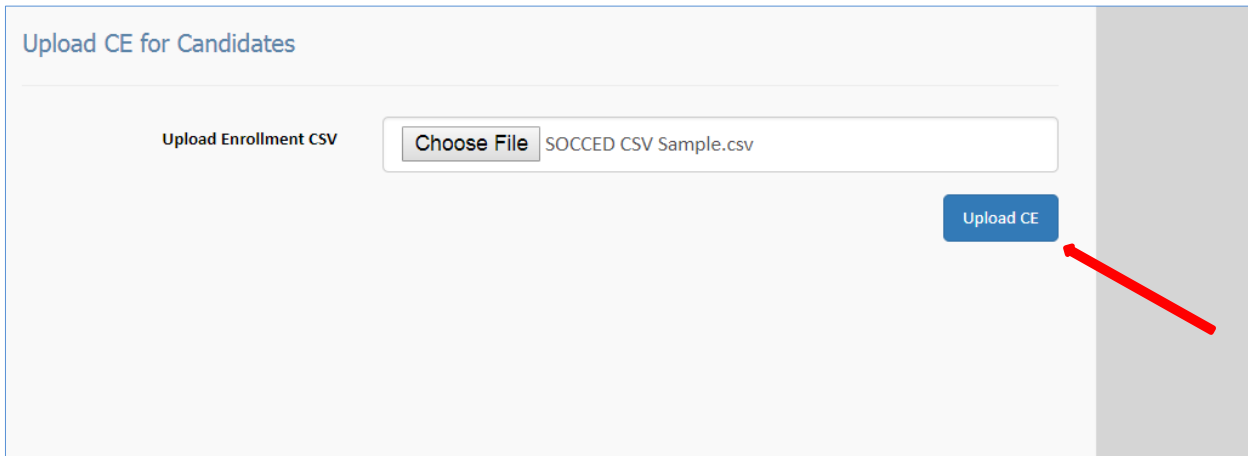


Figure 10. Upload the CEH file to SOCCED.

d.) Check to see if the file was successfully uploaded.

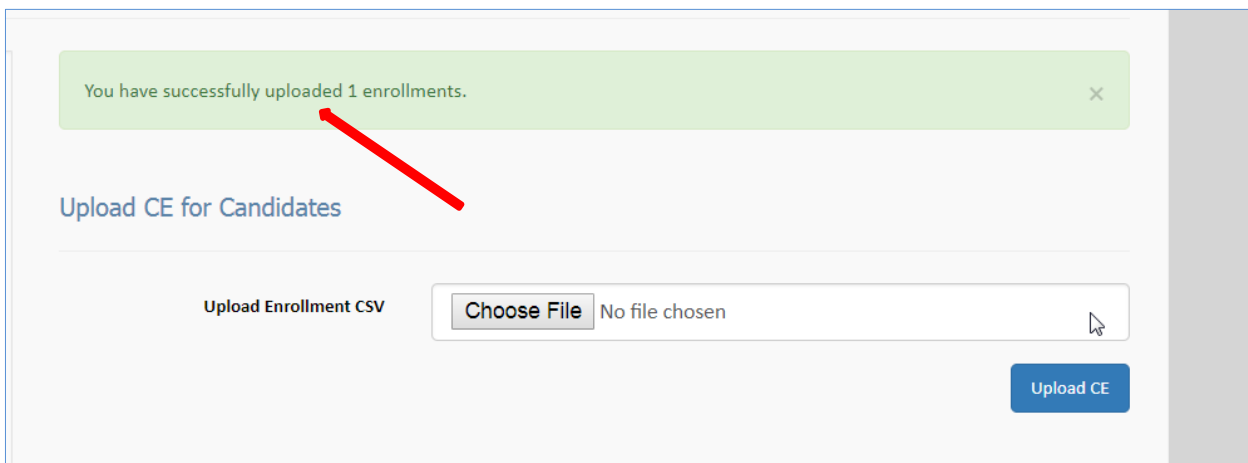


Figure 11. Successful upload.

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Method 2: Starting with a CSV file format in Excel.

1). Follow the link below and you will arrive at the page displayed in [Figure 1](#). Click on the SOCCED CSV Master.csv file to download and save the file to a location of your choosing.

<https://soccedsupport.zendesk.com/hc/en-us/articles/115004502903-SOCCED-CEH-Transcript-Upload-File>

2). Open the file (Figure 12).

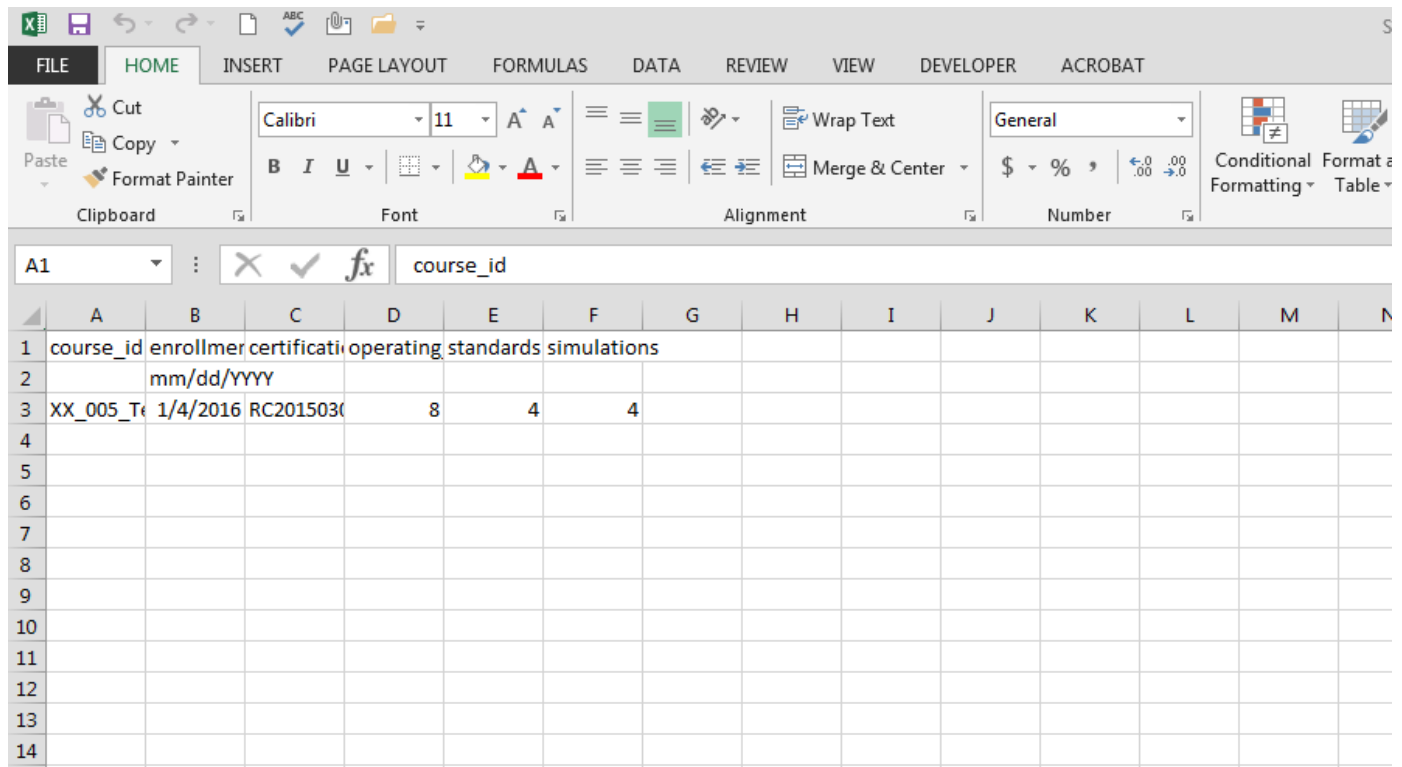


Figure 12. Open the CSV template file.

3.) The file will open with the columns compressed. Spread the columns out (Figure 13) to facilitate readability and data entry.

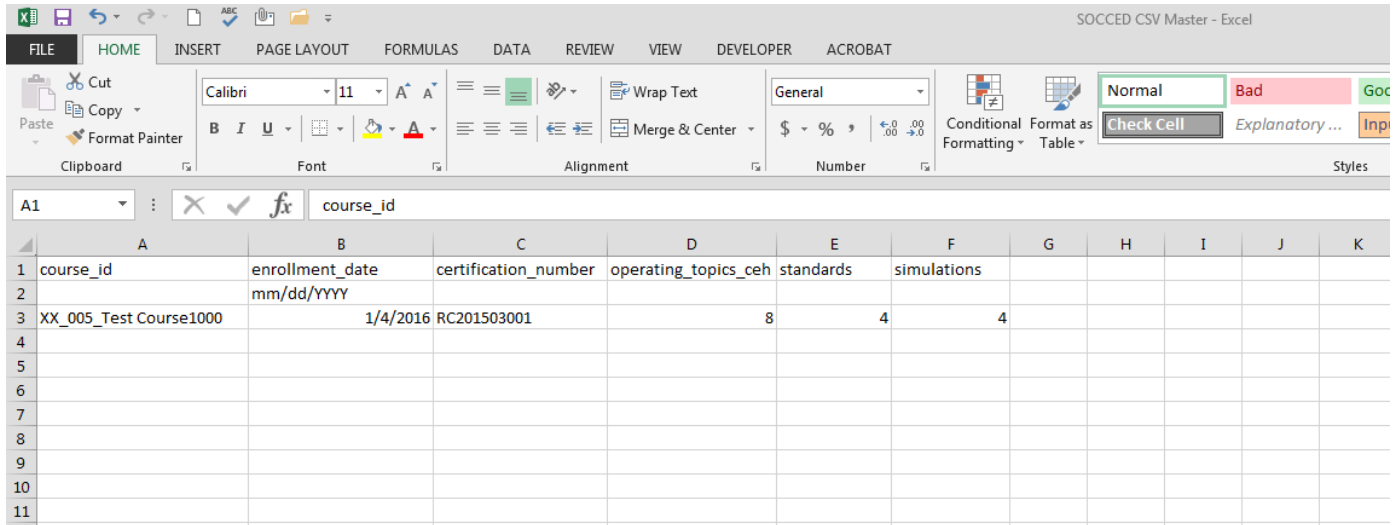


Figure 13. Spread columns out.

4). Fill in the appropriate data under each column heading (Figure 13). Ensure that all cells for each record are completed and in the original format paying particular attention to Column B to ensure it is in the date format as mm/dd/yyyy (Figure 14). Do not change the column heading and data locations as this will cause errors during upload.

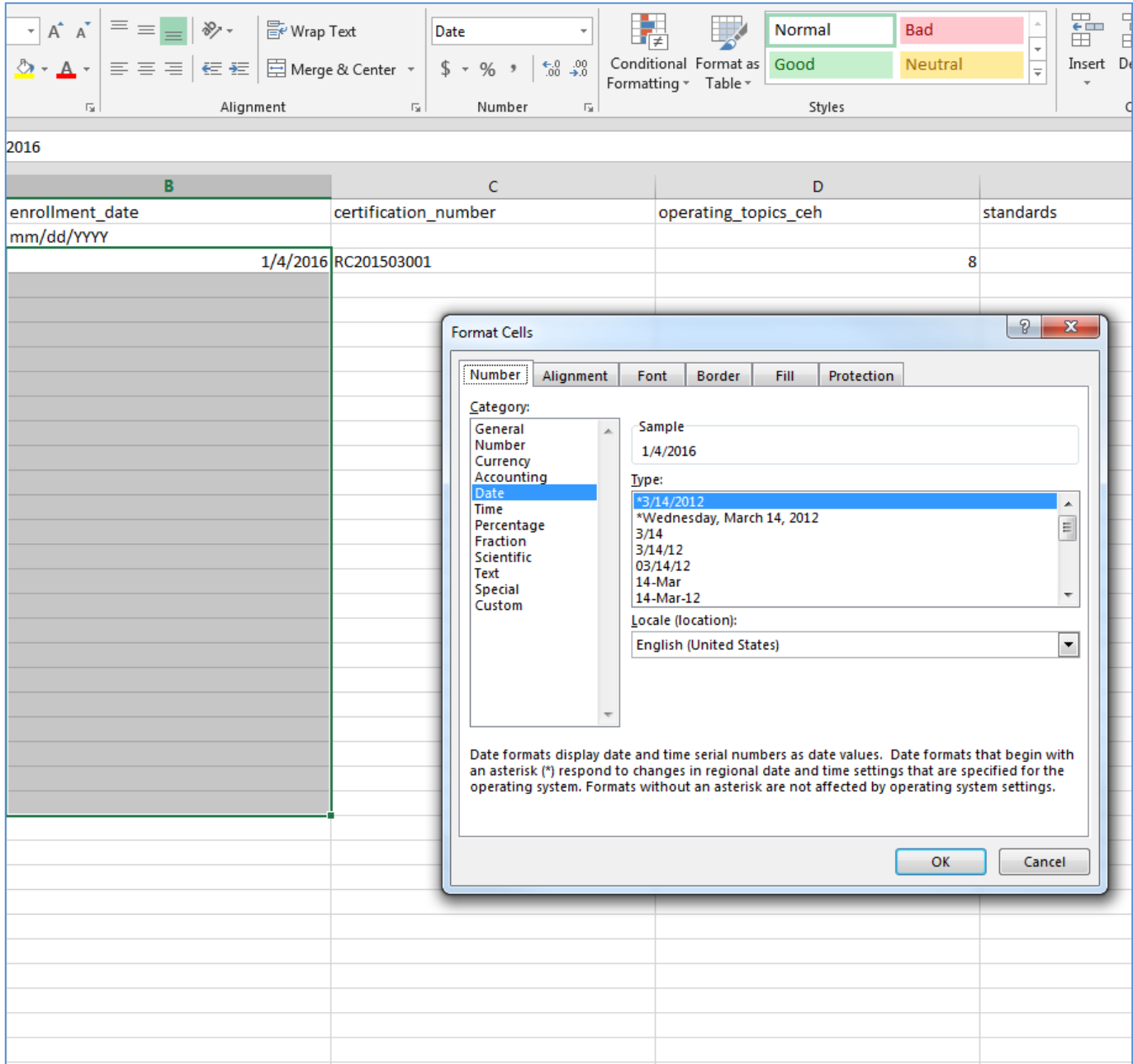


Figure 14. Format Column B.

5). Right click on Row 2 and click the “Delete” button (Figure 15). When the delete dialogue box pops up, be sure to select the “Entire row” radial button. The entire row must be deleted and not just cleared as hidden/residual characters will cause an error during upload to SOCCED (Method 1, Step 9).

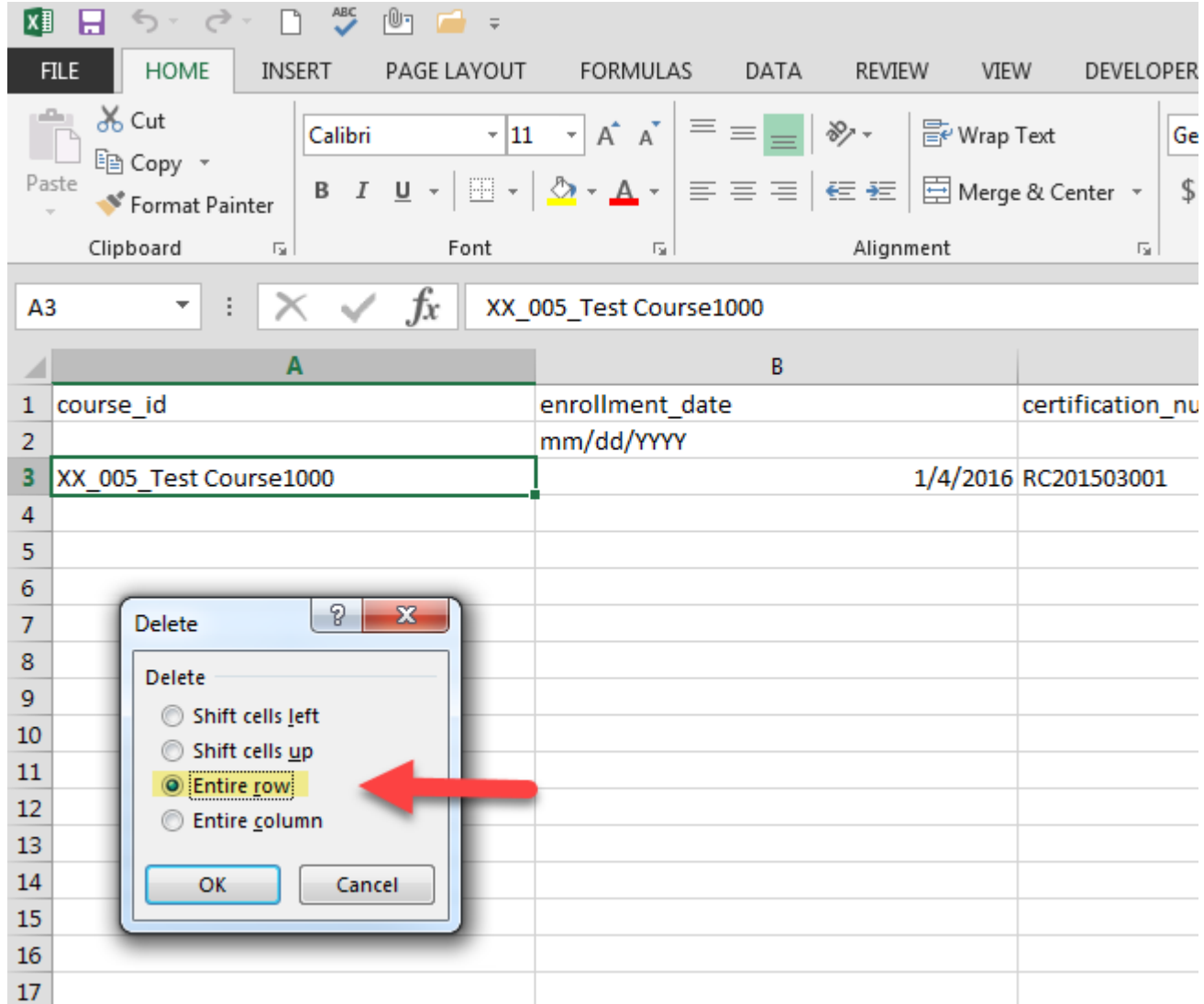


Figure 15. Delete Row 2 sample record.

6). Save the file, close the file, double check the file formatting and upload the file following [Steps 5-7 of Method 1](#).

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Important Considerations

- Double check the integrity of the CVS file by opening it in Microsoft Notepad. Check for commas without data in between. Eliminate all stray commas (Figure 16) and save the file.

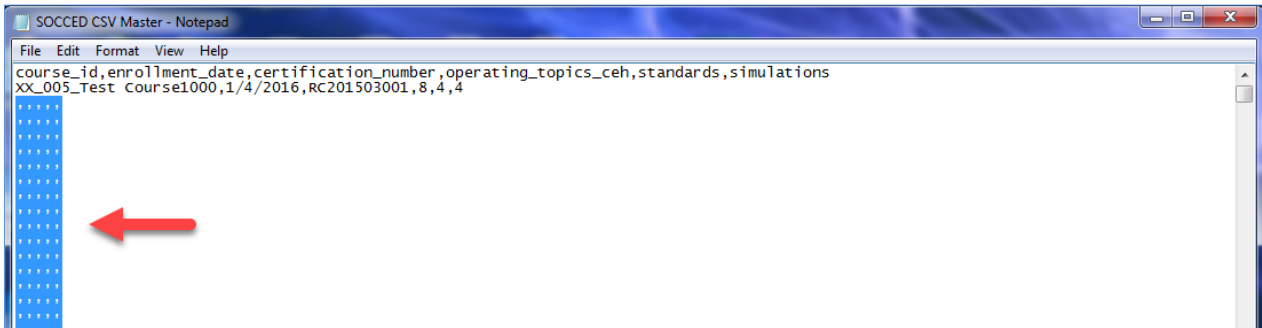


Figure 16. Eliminate stray commas.

- If modifying a previously used file, eliminate stray commas as mentioned above.
- Do not change the column heading and data locations in the file as this will cause errors during upload.