



MEa LEARNING EMPOWERS™

Getting Ready for Enhanced EnergyU

Important information for EnergyU Administrators

- 💡 This presentation will provide a brief overview of the new system.
 - 💡 Learn the steps you should take to prepare for migration.
 - 💡 Login to practice on the training site and ensure you are familiar with the new system.
 - 💡 Update your internal company procedure as required.
- 💡 Migrations will begin in May 2024 and all companies will be migrated by September 2024.

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- Visit MEAEnergy.org to register for future EnergyU Administrator training events. There will be many over the next few months.
 - It is our goal to get administrators access to the training site as soon as possible, giving you plenty of time to become familiar with the new features and functionality prior to actual migration.
 - The training site has been populated with your actual users and data as of March 28, 2024. Feel free to make modifications to the users and data on the training site – this will not affect your actual live data or impact data migration.
 - In preparation for going live, Administrator, Evaluator, and Learner guides may be downloaded from the training site.
 - Administrators may use their existing EnergyU login and password to access the training site at the following URL:
<https://preprod.stellar-oqcs.com>

NOTE: The training site is for testing/learning by administrators only. Do not use the site for real testing or evaluations as no completions on the training site will be considered valid or transferrable.

What's new overview

This is not just an upgrade, it's a whole new system.

- ♦ EnergyU will now provide single access to formerly disparate systems.
 - ♦ The following features and functionality will now be available under a single login:
 - EnergyU Learning Management System (formerly Infor LMS)
 - Badges (formerly eConfirm)
 - Compliance (formerly OQplus and CERCplus)
 - Evaluations (formerly EZval electronic app and PEF Uploader)

MEA has listened to the needs of members and customers. It is our goal to deliver the best compliance product to meet your training and OQ needs.

What are the biggest changes?

Task Based



JOB POSITION TASK LISTS

Task-based system

- System is no longer requirements-based.
- Requirements are grouped into tasks with task specific rules and an expiration date.

	OLD Number	NEW Number	Description	Re-Eval Interval
Task	MEA1462	MEA192-AOC-TNG	192-Abnormal Operating Conditions eTNG	36
	MEA1291	MEA192-AOC-KNT	192-Abnormal Operating Conditions KNT	36
Task	MEA1459	MEA192-0101-TNG	192-0101 eTNG Characteristics and Hazards of Natural Gas	36
	MEA1292	MEA192-0101-KNT	192-0101 KNT Characteristics and Hazards of Natural Gas	36
Task	MEA1356	MEA192-0201-TNG	192-0201 eTNG Gas Detection and Alarm System Maintenance and Performance Test	36
	MEA1128	MEA192-0201-KNT	192-0201 KNT Gas Detection and Alarm System Maintenance and Performance Test	36
	MEA11	MEA192-0201.00-PEF	192-0201.00 PEF Gas Detection and Alarm System Maintenance and Performance Test	36

We have moved to a task-based system. Tasks are comprised of one or more requirements, and rules can be setup to apply to how or when those requirements are completed.

Certificate programs have gone away – along with certificate numbers that people found so confusing. So you can discard your certificate list because Task and course IDs will now match. ISN also has the new updated numbers. We have a new number to old number conversion chart available for your reference.

Because the system is task based, you will be able to easily see if someone is qualified for a task without having to manually review the completion dates for individual requirements.

Based on how you currently use the system, MEA will provide you with the appropriate task list. Companies can also create a custom task list.

Current course assignments will be transitioned into MEA task assignments as part of the upgrade. This means that if a user has either the 192-1402 TNG or KNT assigned, they will be enrolled in the 192-1402 task from the selected MEA task list. Any additional operator or custom task assignments will need to be completed following the upgrade.

What are the biggest changes?

Job Positions



JOB POSITION

TASK LISTS

🔥 User assignments simplified

- 🔥 Assign one or more tasks to users, or
- 🔥 Group tasks into job positions for assignment to users.

Job Position: Laborer		
Task ID	Description	Requirements
MEA192-AOC	Abnormal Operating Conditions	192-AOC-TNG 192-AOC-KNT
MEA192-0101	Characteristics and Hazards of Natural Gas	192-0101-TNG 192-0101-KNT
MEA192-0801	Locating Pipeline	192-0801-TNG 192-0801-KNT 192-0801-PEF
MEA192-0804	Damage Prevention During Excavation	192-0804-TNG 192-0804-KNT 192-0804-PEF

A user completing all requirements for a task will be qualified for the task. A user completing all tasks will fulfill the requirements of the job position.

While the use of tasks makes user assignments easy, the user of job positions makes it even easier.

If you are currently using defaulted levels for automated course assignments, you can use job position assignments in the new system.

NOTE: You will need to create and assign the job positions in the new system – level information will not automatically transfer to a job position during migration.

Assignment of a job position completes both task and requirement assignments for the user in one click. Administrators have full control over the creation and assignment of job positions – no need to contact MEA. Qualification for a job position can also be displayed on the badge scan.

- QR code link will be provided for every user
 - Link in the user profile displays user records.
- Admins can modify the three default badge templates.
 - Customize logo, colors, information.
 - Set display properties for badge scan.
- Print badges for all/select users.

Badges are now integrated with EnergyU.

A QR code link is provided for every user, whether you want to print a badge or not.

Scanning a badge takes you to the link to display the employee's qualification status.

The badge scan can be setup to display status for one or all of the following:

- Requirements
- Tasks
- Job positions

How do I prepare for the upgrade?

- ✦ Prior to the upgrade you can prepare for a smooth data migration for your organization.
 - ✦ Do you need to perform cleanup of users (LMS vs. Badges)?
 - ✦ Make sure that your employee IDs for users in the LMS and badges match.
 - ✦ If a user is assigned a course they will be enrolled in the task at migration.
 - ✦ Do you need special task rules?
 - ✦ Do you want to have prerequisites or proctoring?
 - ✦ Will you use job positions?
 - ✦ Document current EnergyU levels to create new EnergyU job positions.
 - ✦ Do you want a new password policy?
 - ✦ Default is 8 characters, case sensitive.
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You will be provided with an MEA task list that matches how you currently use the system. This means that if you currently have the TNG as a prerequisite to the KNT, you will be provided with a prerequisite task list. If you use 36-month certificates, you will have the 36-month task list. If you

In addition, you may also elect to have a Proctor task list. This would require a proctor to unlock the knowledge test for the user.

Available task lists include:

- MEA Standard Requalification
- MEA Standard Requalification with Prerequisites
- MEA Standard Requalification with Proctoring
- MEA 36-month Requalification
- MEA 36-month Requalification with Prerequisites
- MEA 36-month Requalification with Proctoring

Getting prepared... User assignments

Decide on your company's use of job positions.

- ◆ Unassign courses if you do not want users to be assigned the task.
 - ◆ If a user has a TNG or KNT assigned, they will be enrolled in the corresponding MEA task during migration.
- ◆ Decide what job positions you will want to create.
 - ◆ This could be based on your current level assignments.

Admin access to the production site will be provided a few days prior to data migration. During this time, you may complete tasks such as job position creation. Job position assignment will take place after migration.

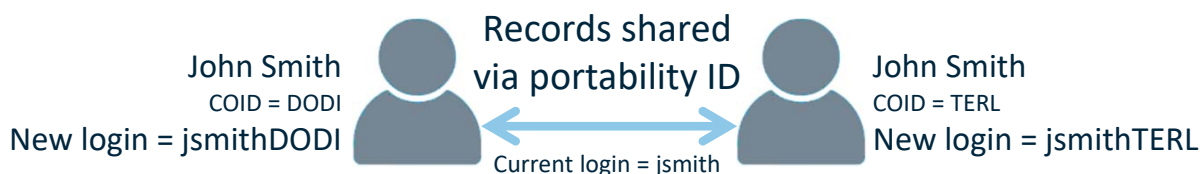
On day one in the new system users will have access to the exact same courses they had in the old system.

Job positions can be created prior to GoLive and then assigned on day one of GoLive.

Getting prepared... Shared users

Decide on your company's policy for sharing users.

- Currently, shared users have a single login. After migration, shared users will have a separate login at each company.
- Multiple logins will be created as part of migration.
- A portability ID will be assigned to the shared logins.
- Administrators will have control over which companies they share records with or receive records from.



Administrators may set one global sharing policy to continuously send/receive completion updates to/from all companies, or to not send/receive to/from any companies.

Selecting None will allow record sharing settings to be set for each individual user. This may be continuous or a one-time snapshot to update shared records.

The "Manage Sharing" dialog box shows settings for "Dollhouse Digging, LLC (DODI)". It includes dropdown menus for "Set Share" and "Set Receive", both currently set to "None". A dropdown menu is open under "Set Receive", showing options: "None" (highlighted), "Elect to receive from ALL companies", and "DO NOT elect to receive from ALL companies".

The user details page for "Doll, Bernie" shows login information: "LOGIN - BernieDoll, COID - DODI, PORTABILITY ID - ORDOB683". It indicates that "Company-wide receipt of records is turned off" and "Company-wide sharing of records is turned off". There are buttons for "Set receive records from..." and "Set share records with...". Under "Set Receive Records", there are radio buttons for "ME (MEA1)" (checked), "Continuous", and "One Time Sharing". A date field shows "3/18/2024". At the bottom, there are "Cancel" and "Share" buttons.

Getting prepared... Image files

Know your company's brand colors and have required image files available.

♦ User profile photos

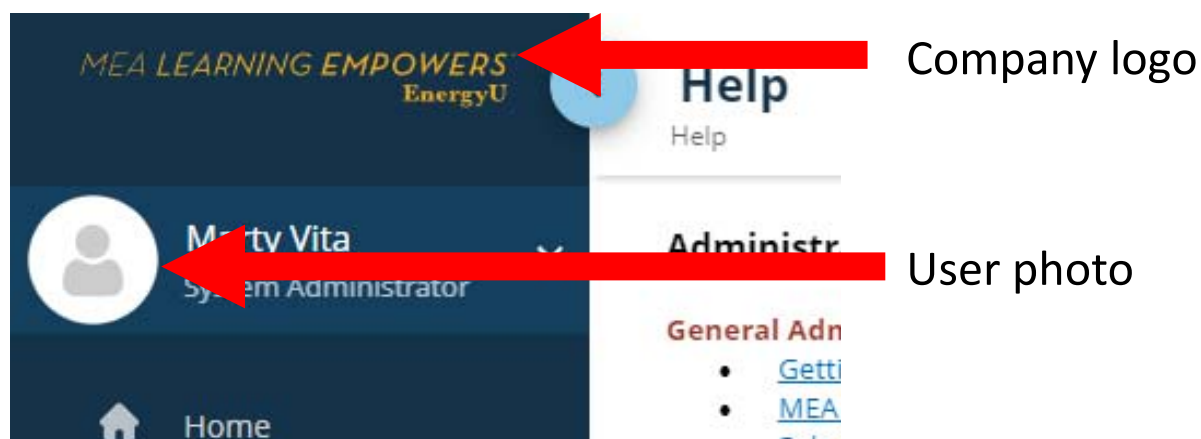
- ♦ Recommended minimum size: 250 pixels by 250 pixels

♦ Logo for badge templates

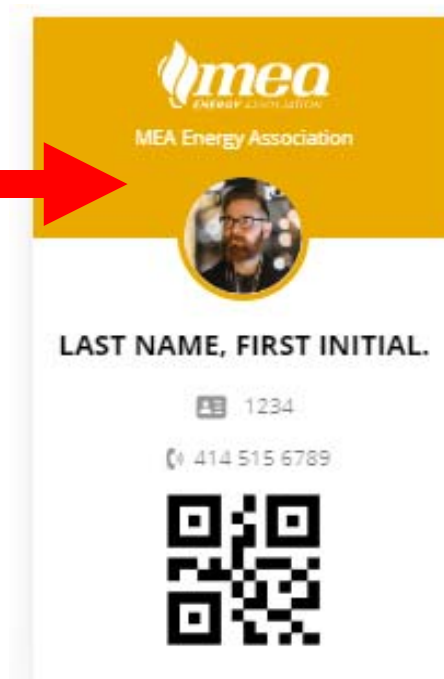
- ♦ Logo file dimensions: 150 pixels by 50 pixels

♦ Logo for navigation panel

- ♦ Logo file dimensions: 200 pixels by 50 pixels
- ♦ Color match for blue navigation panel background use:
RGB 0-38-62 or HEX 00263E



Badge colors and logo



FYI... Third-party administrators

Third-party administrators will require a separate login for each company they administer.

- ◆ Third-party administrators will have a login for each company they administer.
 - ◆ Like shared users, multiple administrator logins will be linked via a portability ID.
 - ◆ Primary administrators have full control over company administrators and their permissions.
 - ◆ All administrators will require a license.
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Newly created logins will use the administrator's existing login appended with the company ID.

Migration dates

- ⚡ Your migration setup period will be Monday-Thursday for the week prior to GoLive.
 - ⚡ Primary administrators will have access to the production site to complete certain setup procedures.

- Changes to existing user profiles not allowed until Live (green).
- Primary Admin has access to production site to perform company setup activities.
- Access to both production site and Infor LMS disabled. No course access for users.
- LIVE! Upgrade complete – use new URL for accessing system

Sample Calendar (shows timeframe)



☑ Migration setup... System settings

🔥 Select your password policy

- 🔥 Existing user passwords will work no matter what password policy is set.
- 🔥 Reset passwords will need to meet policy.
- 🔥 Logins and Passwords are now case sensitive.
- 🔥 User logins cannot be changed.

🔥 Add company logo (if desired)



Company Management

Manage Logo Images

Manage Password Policies

Password Policy Options:

- System Default
- Password is case sensitive
 - Minimum characters required (6)
 - Maximum characters allowed (16)
 - Alpha characters required (1)
 - Numeric characters required (1)
 - Special characters required (1)
- Password is case sensitive
 - Minimum characters required (8)
 - Maximum characters allowed (16)
 - Alpha characters required (1)
 - Numeric characters required (1)
 - Special characters required (1)
- Password is case sensitive
 - Minimum characters required (8)
 - Maximum characters allowed (16)
 - Alpha characters required (2)
 - Numeric characters required (2)
 - Special characters required (2)

☑ Migration setup... Badge scan properties

- 🔥 Upload user photos.
- 🔥 Complete badge template setup and select default badge template.
- 🔥 Select scan display options for completions and qualifications.

Display Options for badge scan (Select all desired)

Job Positions Tasks Requirements

- 🔥 Customize display of expired items.

Display Options for expired (Select One)

Always show expired Never show expired Only show expired for days



CUSTOMIZE TEMPLATE | BADGES SCAN PROPERTIES

Template Name:

Theme Colors: OR Choose Custom Colors

Text Colors: OR Choose Custom Colors

Logo: ⓘ

Company Name:

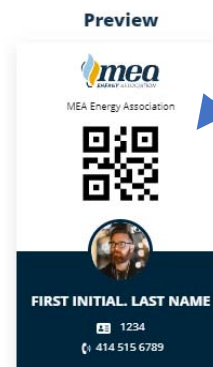
EMP ID:

Name: Last Name, First Initial. First Initial. Last Name

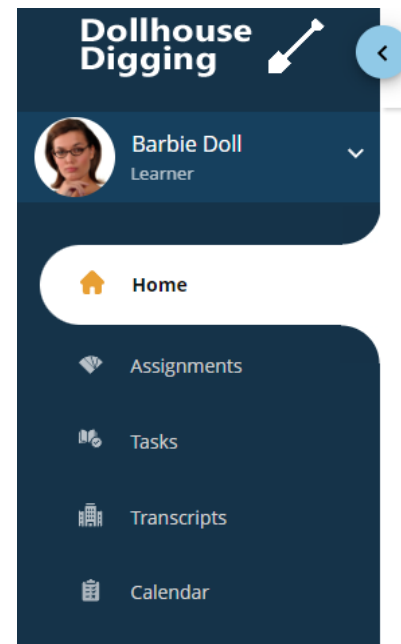
Phone:

Set as Default:

Customize Badge



Customize Navigation Panel



You may print badges prior to GoLive.

☑ Migration setup... Announcements and notifications

- 🔥 Create company Terms and Conditions (if desired).
- 🔥 Set up any announcements or acknowledgements you want to appear when users log in.
 - 🔥 May be company-wide or for specific user roles.
- 🔥 Let MEA know if you would like to change default notifications.
 - 🔥 Default dashboard notification is ON.
 - 🔥 Default email notification is OFF.



☑ Migration setup checklist

Administrators MAY...

- Upload company logo
- Set password policy
- Upload user photos
- Design badge (colors, logo, info display, set default template)
- Print badges
- Add user role/permission for proctors/manager
- Assign users an evaluator or manager
- Create job positions (job positions used for task assignments and reporting)
- Create and assign additional role specific permission groups

Administrators MAY NOT...

- ✗ Create a new user
- ✗ Request additional licenses
- ✗ Request additional course libraries
- ✗ Share users
- ✗ Upload new course content, create forms or exams
- ✗ Change or add user profile information (other than photo and role)
- ✗ Assign job positions



☑ GoLive

- 💡 Make sure all users have correct URL for login.
 - 💡 Make sure evaluators download the new evaluation app.
 - 💡 Assign job positions to users (if created).
 - 💡 Best practice to remove tasks prior to assigning job positions. This enables removal from job position to include removal from task assignments.
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Login to the training site:

PreProd.stellar-oqcs.com

Check for future training events:

MEAenergy.org/events

Questions? Contact

ProductSupport@MEAenergy.org



☑ CHECKLIST for Primary Admins

NOTE: Default settings as follows:

- Password Policy: NONE
 - Notifications: Dashboard ON, Email OFF
- Contact MEA if you wish to change notifications*

During the migration setup phase (approx. 4 days)...

Primary Admin will have access to the production site to:

- Verify access to correct task list(s) and catalog(s)
- Verify company admins are setup and assigned permissions
- Verify evaluator role and MEA EVID assigned
- If applicable, verify third-party administrators have access
- Verify portability IDs created for shared users (verify logins and sharing)
- Verify custom courses
- Assign evaluator to users (if desired for using PC for evaluations)
- Assign manager role AND manager permission to user(s) as required
- Assign specific user(s) to specific manager
- Change pw policy if desired
- Set up announcements if desired
- Upload user photos
- Set up badge template and print user badges
- Admins may wish to setup job positions prior to migration
DO NOT assign job positions to users
Job position assignments must be completed post migration
- New URL for accessing EnergyU following migration: mea.energyu.org

IMPORTANT: Do not make any changes to the information in user profiles—information updates can be made once data migration is complete. Also, do not complete any user assignments or create new courses, forms, task lists, etc.