File Naming Tool: Detailed Instructions

1. Select the Cell Labeled Document Type and use the dropdown menu to select the file type to be named.

2. Once a file type is selected additional required fields will be marked automatically with the word "Required".

3. For each field marked required use the drop down menu to select the appropriate value. Note there is a display in the top right corner that indicates the number of required fields that still need to be completed.

4. For Energy Management Calculators (Track and Tune, Energy Project Manager, and High Performance Energy Management completion date refers to milestone dates)

5. If appropriate select the field marked "Wildcard Information" and enter any value you choose. This optional field gives each customer the opportunity to provide unique information outside of the designated naming convention (e.g. an existing file name to be correlated with an existing database), while still allowing for submittal via BPA's Interim Reporting System.

6. The cells marked "Reporting for PNCG", "Account Number", "Utility Name (as a check)" are for members of the PNGC pooling group only. If you are not a member of PNGC you will not need to use these fields.

7. In the cell marked "Reporting for PNGC" select whether this file is being submitted for a PNGC utility. If "No" is selected, please skip to step 9.

8. If this file is being submitted for a PNGC utility the utility's account number will need to be selected using the drop down menu in the cell marked account number. Once selected the File Naming Tool will auto populate the Utility Name cell which will provide an opportunity to check the accuracy of the account number entered.

9. At this point the file name is complete, select the cell marked "File Name Convention" and copy its contents by right clicking and selecting "Copy"

10. Rename the file to be submitted by opening the file, selecting "Save As", deleting the existing name in the File name field, right clicking the field and selecting paste.

11. Important delete the contents of all cells in the File Naming Tool before using it to name a new file, contents left in cells will interfere with the name generated for subsequent files.