Interim Reporting Solution: File Naming Tool

What it is:

The interim reporting system which will be conducted through BPA's Customer Portal will require that documents submitted use a consistent set of naming parameters. This naming convention will provide the interim reporting system with the information it needs to effectively process the files submitted. In the absence of an appropriate file name, the Interim System will not be able to process the file and it will be returned. To help ease this transition BPA has created a File Naming Tool that provides utilities a set of drop down menus to identify the pertinent information of the file being submitted (e.g. file type) and provides the appropriate name which can be pasted into the filename prior to submission

Why it is important:

BPA would like to minimize both the burden associated with implementing a uniform naming convention and the potential delays and rework that arise when files are improperly named. This tool will make it as easy as possible to accurately name files being submitted to the Customer Portal Interim Reporting System when it goes live.

How it Works

The File Naming Tool consists of a set of drop down menus that allows utilities to select the pertinent information for each file being submitted and will then provide the appropriate file name which can then simply be copied and pasted into the filename of the file being submitted. Detailed instructions can be found on the IM Manual Document Library but at a high level the file functions as follows:

1. Select the document type being named (e.g. lighting calculator) from the cell labeled "Document Type"

2. Once selected additional fields that must be filled will be marked "Required" automatically by the File Naming Tool. For example, Lighting Calculators require Funding Source, Completion Year, Completion Month, Completion Day be entered.

3. Fill in the fields marked "Required" by using the drop down menus for each cell.

4. Select whether this report is being submitted by a PNGC utility, if so enter the appropriate utility account number in the cell labeled "Account Number".

5. Copy the file name from the cell labeled "File Name Convention" by right-clicking that cell and selecting copy.

6. Rename the file being submitted by opening the file, selecting Save As, and pasting the file name copied from the File Naming Tool by right-clicking the existing file name and selecting paste.