



File Naming Convention Vendor Actions

Training Guide
2024

INTERNAL

Vendor: File Naming Conventions

Overview of Steps – File Naming Convention

Purpose: File naming conventions

Steps – [Vendor]

- 1 Select “Add Attachment”
- 2 Enter correct naming convention as “Title”

Steps – [Con Edison TPO]

- 3 Login and click on “CE SMG Team Member” under Navigator
- 4 Click “Entry” under CE SMG Team Member
- 5 Enter Supplier’s name under “Simple Search” & Select “Go.”
- 6 Select “Company Profile” & scroll to the bottom to see the attachments
- 7 Enter file type (example “COI”) and select “Go” to filter attachments for correct document
- 8a Select Attachment (it will open in a separate tab). If approve of naming convention and file – leave as is
- 8b If do not approve of naming convention and file – Select Trash Bin and Select “Yes” in the pop up

Step 1: Select “Add Attachment”

Supplier Home Orders Shipments Planning Finance Product Administration Assessments Manage Supplier Broker

Profile Management

General

Company Profile

Organization

Address Book

Contact Directory

Business Classifications

Product & Services

Banking Details

Payment & Invoicing

Surveys

General

Organization Name [REDACTED] DUNS Number [REDACTED]
Supplier Number 7017 Tax Registration Number [REDACTED]
Alias [REDACTED] Taxpayer ID [REDACTED]
Parent Supplier Name [REDACTED] Country of Tax Registration [REDACTED]
Parent Supplier Number [REDACTED]

Attachments

Search

Note that the search is case insensitive

Title

▶ Show More Search Options

Add Attachment | ...

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
COMPASS UPDATE	File		From Supplier	ROBINSONSA	26-Jun-2015	One-Time			
LEGAL HOLD 114,000	File		From Supplier	RODRIGUEZGARCIAW_TASK120283	23-Oct-2015	One-Time			
REMOVE FROM LEGAL HOLD	File		From Supplier	RODRIGUEZGARCIAW_TASK120283	26-Oct-2015	One-Time			
ACH REQUEST	File	SENT BACK TO DENICE GRE...	From Supplier	RODRIGUEZGARCIAW_TASK120283	25-Apr-2018	One-Time			
W9 OCTOBER 2018 VER	File	ADD CONTACT VINCENT LE...	From Supplier	GREENBERGD	14-May-2019	One-Time			
TEMPLATE	File		From Supplier	GREENBERGD	14-May-2019	One-Time			
TEMPLATE	File	EMAIL ADDRESS CHANGE F...	From Supplier	GREENBERGD	22-May-2019	One-Time			
SDP	Short Text	VENDOR ANNUAL SELF-CER...	From Supplier	ALEXANDERMIC	14-Jan-2020	One-Time			
LEGAL HOLD	File	\$170,252	From Supplier	RODRIGUEZWE	28-May-2020	One-Time			
LEGAL HOLD RE-INSTATED	File		From Supplier	RODRIGUEZWE	11-Jun-2020	One-Time			

Add Attachment ◀ Previous 1 - 10 Next 10 ▶

Step 2: Enter correct file naming convention under “Title”

The screenshot shows a web application interface for adding an attachment. At the top, there is a navigation menu with items: Supplier Home, Orders, Shipments, Planning, Finance, Product, Administration (highlighted), Assessments, and Manage Supplier Broker. Below the navigation is a section titled 'Profile Management' containing the 'Add Attachment' form. The form has a dropdown menu set to 'Desktop File/ Text/ URL'. Under the heading 'Attachment Summary Information', there are three input fields: 'Title' (highlighted in yellow and enclosed in a red box), 'Description', and 'Category' (with a dropdown menu currently showing 'From Supplier'). Below this is the 'Define Attachment' section, which includes radio buttons for 'File' (selected), 'URL', and 'Shared'. A 'Choose File' button and a 'No file chosen' text are also visible.

Step 2A: File naming convention if document has an expiration date and refers to a value

2A: File naming convention: (File Type) | (Expiration Date) Exp MM-DD-YYYY | \$# (value) | #### (supplier number)

Example highlighted

Title ^	Type ^	Description ^	Category ^	Last Updated By ^	Last Updated ^
LEGAL HOLD RELEASE	File		From Supplier	RODRIGUEZWE	15-J
LEGAL HOLD	File	124,000 - LEGAL EMAIL REQUES...	From Supplier	RODRIGUEZWE	05-F
LEGAL HOLD RELEASE	File		From Supplier	RODRIGUEZWE	11-F
SUPPLIER SITE MAINTENANCE	File		From Supplier	RODRIGUEZWE	04-A
CALL BACK PROCEDURE	File		From Supplier	RODRIGUEZWE	06-J
COI EXP 04-01-2024 \$6M 7017	File		From Supplier	SCHROEDERM	07-N

Shipments Planning Finance Product Administration Assessments Manage Supplier Broker

General

Organization Name DONOFRIO GENERAL CONTRACTORS CORP

Supplier Number 7017

Alias

Parent Supplier Name

Parent Supplier Number

*Note: You can find supplier number under “General” on your “Administration” page

Step 2B: File naming convention for documents without expiration dates or an associated dollar value

2A: File naming convention: (File Type) | ##### (supplier number)

Example highlighted →

Title ^	Type ^	Description ^	Category ^	Last Updated By ^	Last Updated ^
LEGAL HOLD RELEASE	File		From Supplier	RODRIGUEZWE	15-J
LEGAL HOLD	File	124,000 - LEGAL EMAIL REQUES...	From Supplier	RODRIGUEZWE	05-F
LEGAL HOLD RELEASE	File		From Supplier	RODRIGUEZWE	11-F
SUPPLIER SITE MAINTENANCE	File		From Supplier	RODRIGUEZWE	04-A
CALL BACK PROCEDURE	File		From Supplier	RODRIGUEZWE	06-J
W9 7017	File		From Supplier	SCHROEDERM	07-M

Shipments Planning Finance Product **Administration** Assessments Manage Supplier Broker

General

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