

## Step-by-Step Procedure

### Scan & Save Documents

Scan the documents per utility procedure using any scanning mechanism (copier, scanner, etc.).

Save the scanned documents to the local scans folder.

Rename the files using the specified nomenclature as indicated on pages 6 – 8.

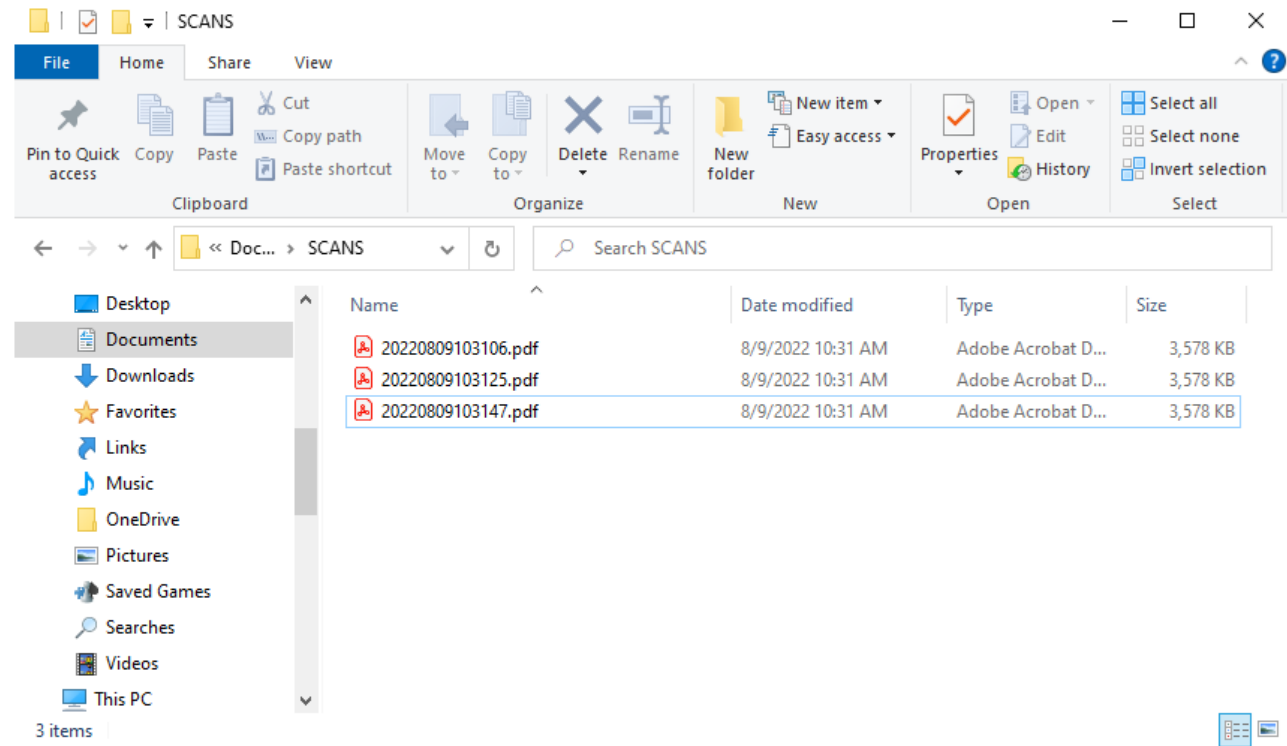
Files may be saved to:

- Account Level
- Customer Level, or
- Premise Level

**NOTE:** Avoid using any 'special' characters including but not limited to:

<i>Ampersand</i>	&
<i>Single Quotes</i>	' '
<i>Double Quotes</i>	" "
<i>Percent</i>	%
<i>Back Slash</i>	/
<i>Forward Slash</i>	\

*Use of special characters may prevent the document from opening in NorthStar.*



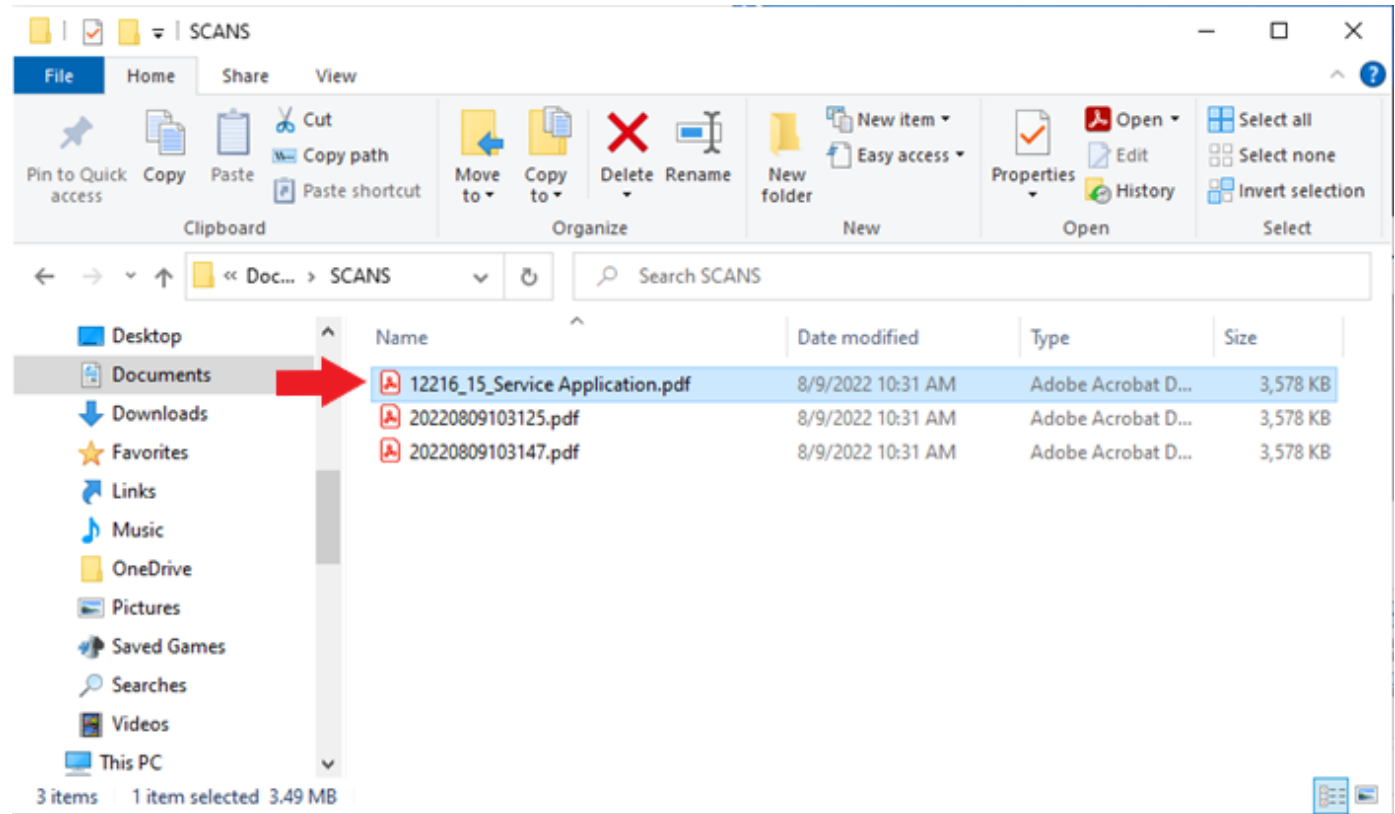
## Scanned File Nomenclature

### Account Level

Acct#\_Occupant#\_Document Name

Example:

12216\_15\_Service Application



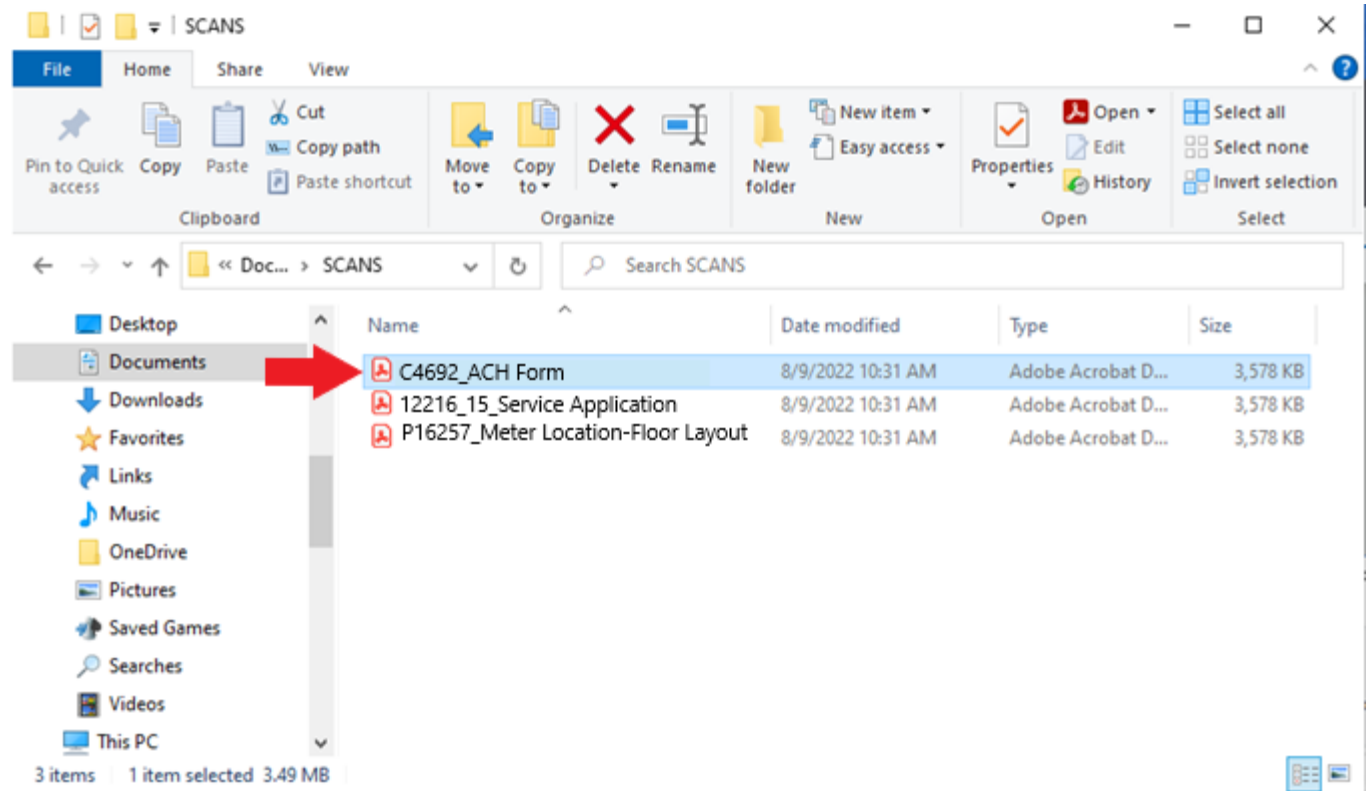
## Customer Level

CCustomer#\_Document Name

*Example:*

*C4692\_ACH Application*

*NOTE: To save at the customer level, the customer# must be preceded by the letter 'C'.*



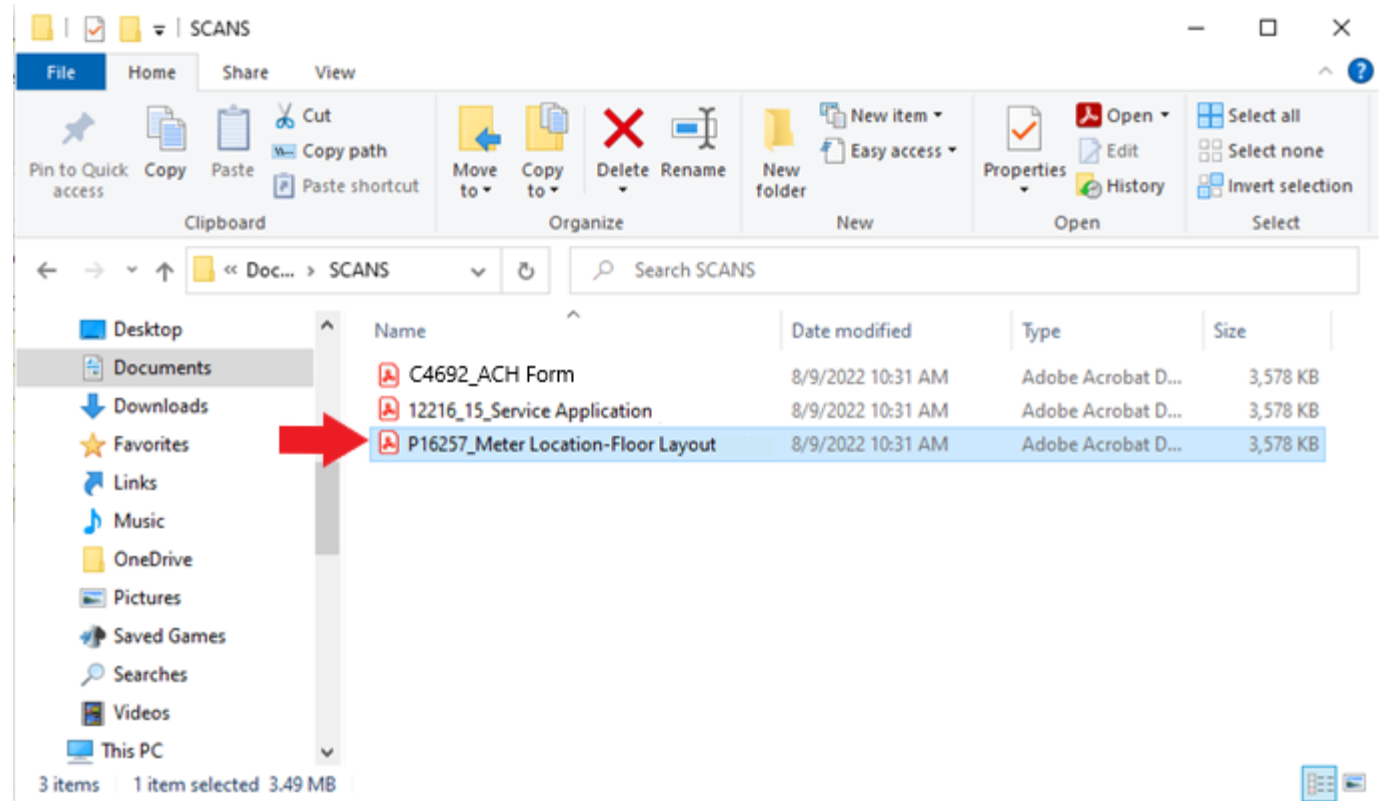
## Premise Level

PAccount#\_Document Name

*Example:*

*P12216\_Meter Location-Floor Layout*

*NOTE: To save at the premise level, the account# must be preceded by the letter 'P'.*



## FileZilla

Once all documents are scanned and saved, open FileZilla (or similar application).

Login using the information shown below.

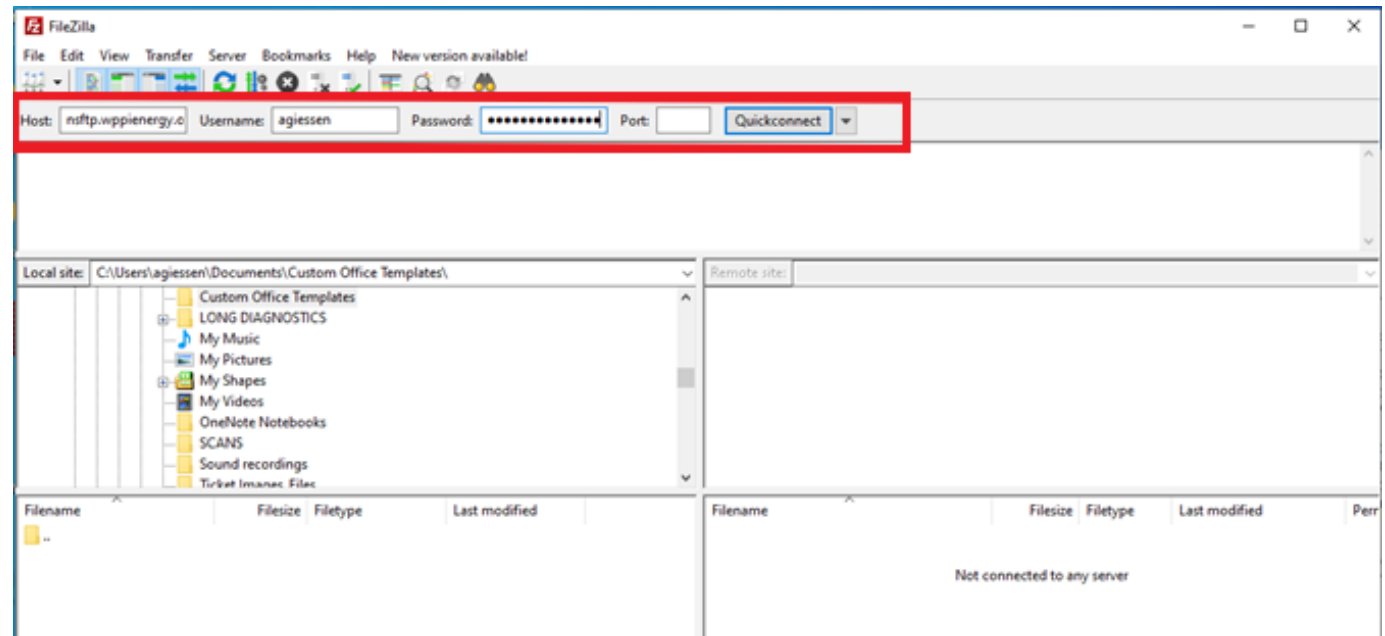
**Host** = nsftp.wppienergy.org

**Username** = Citrix Username

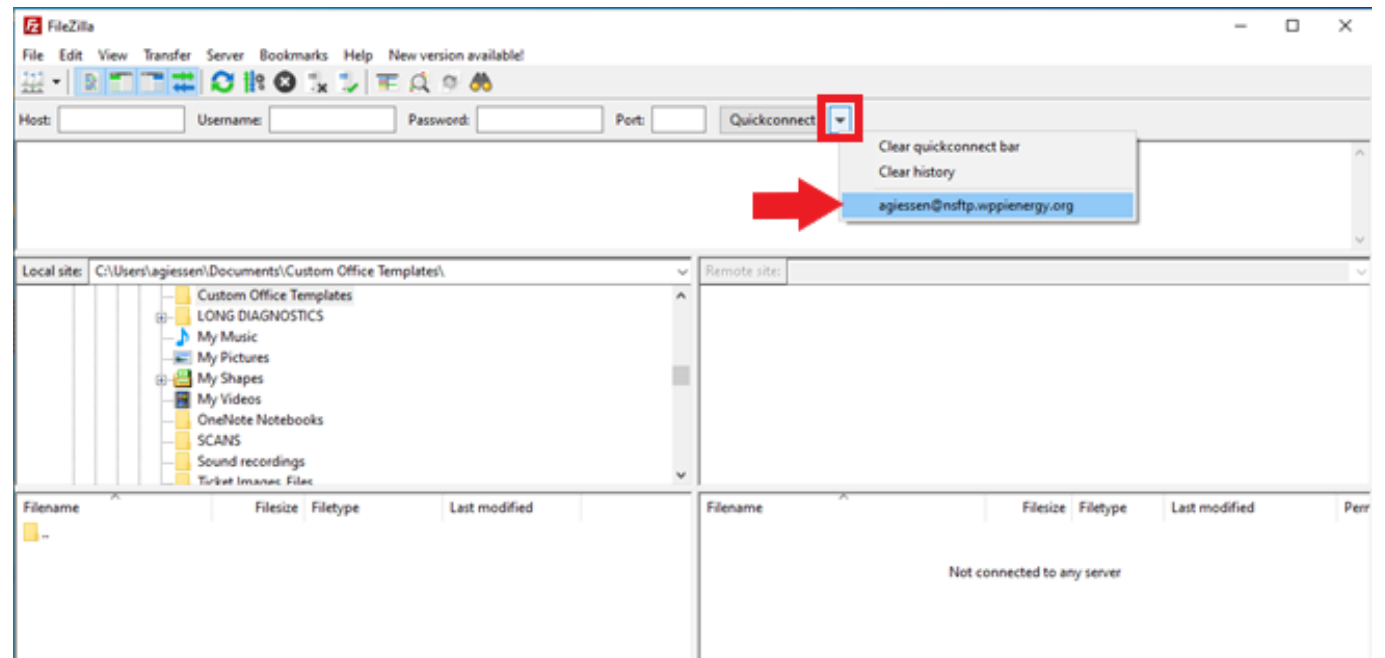
**Password** = Citrix Password

**Port** = leave blank

Click the **Quickconnect** button.



*NOTE: After the initial sign-in, subsequent logins may be done using the dropdown arrow to the right of the Quickconnect button. Select the autosaved user and enter the password when prompted.*

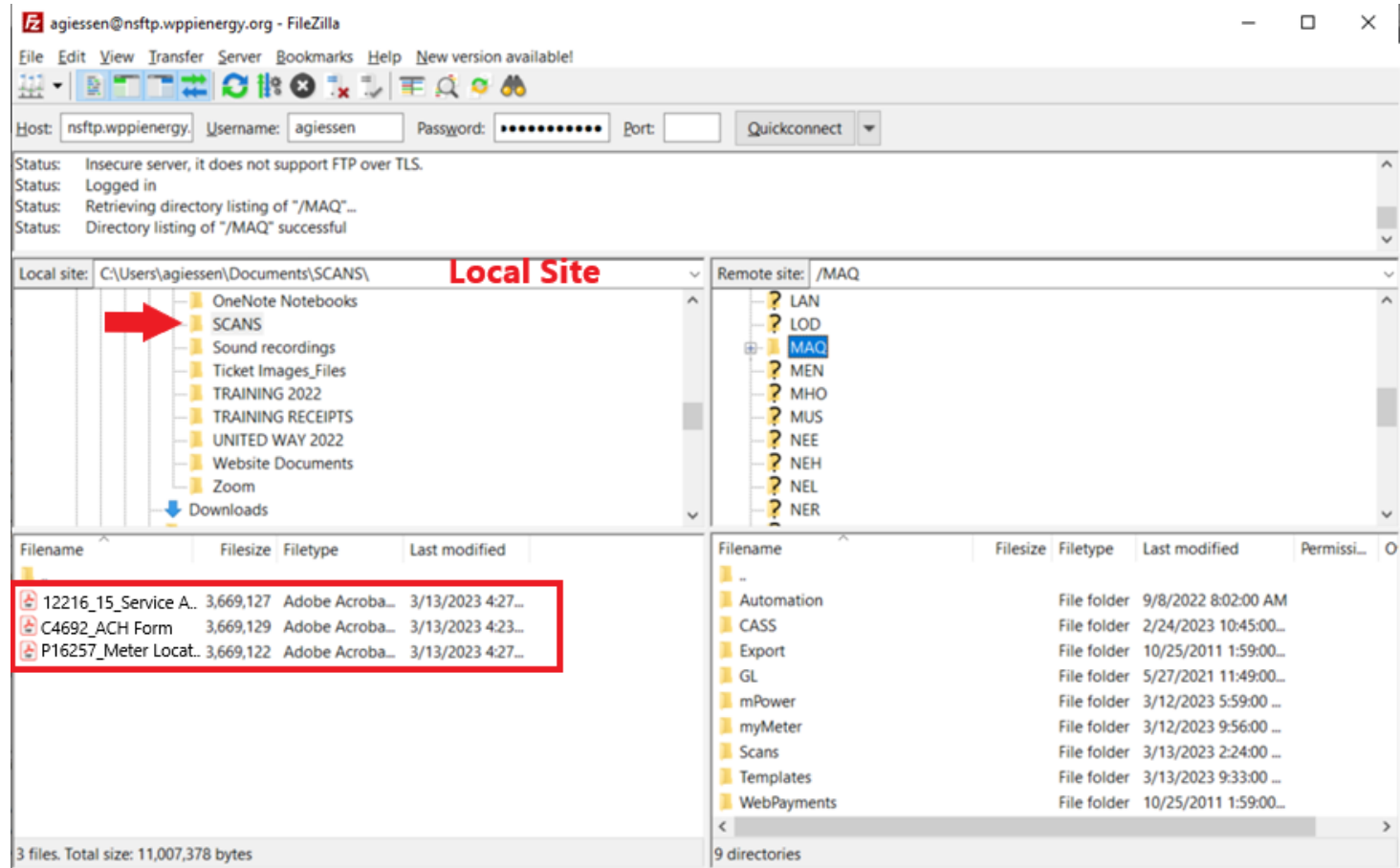


The **Local Site** (left side) contains access to the user's local folders on their computer.

Locate the **Scans** folder on the Local Site where documents were saved after scanning.

Click the Scans folder. This opens the folder in the lower section of the Local Site.

The newly scanned/renamed documents are visible.



12216

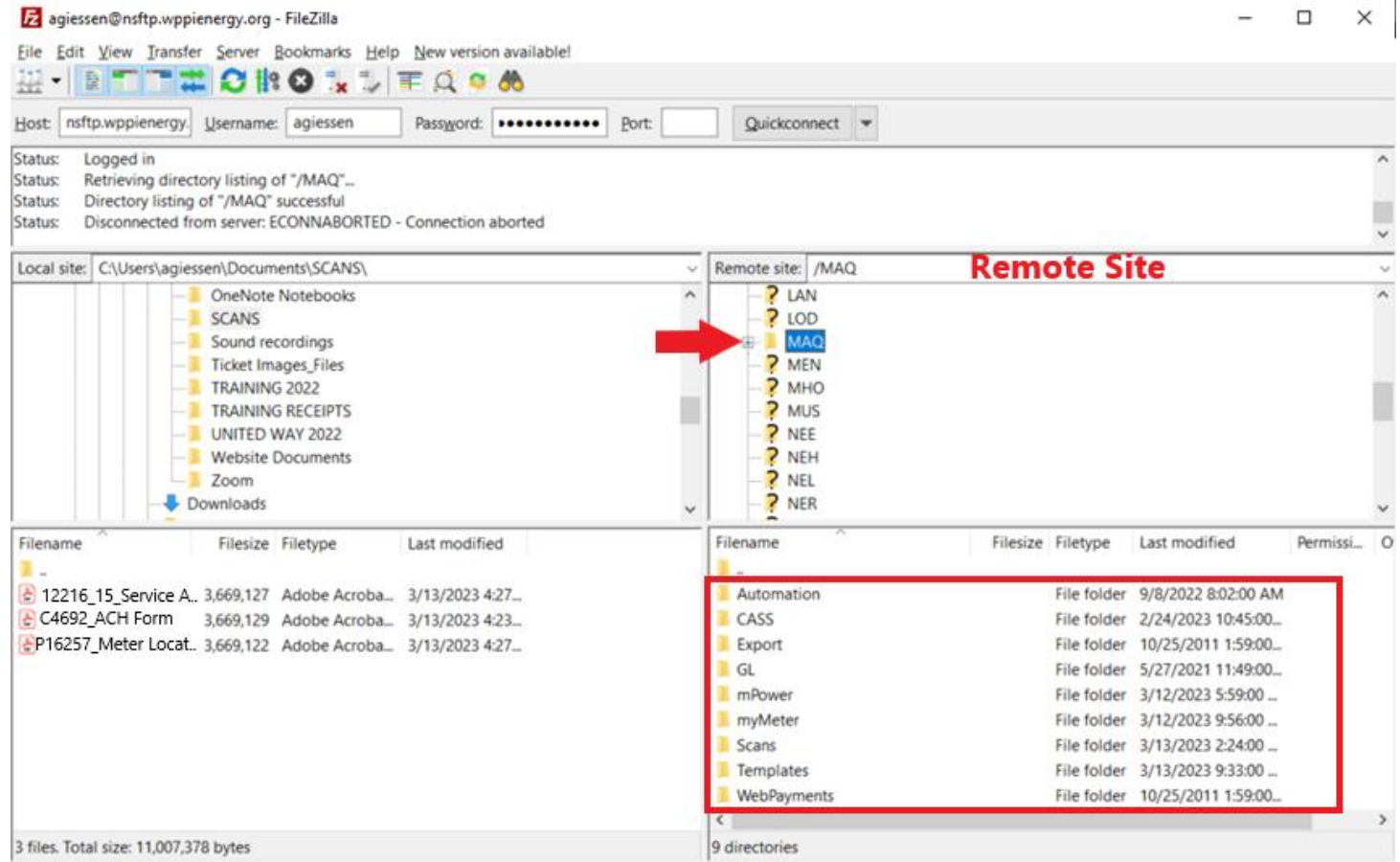
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The **Remote Site** (right side) provides access to the ftp folders housed at WPPI Energy.

Locate the Utilities' folder on the Remote Site.

Select the Utilities' folder.

The lower section updates to display the available folders on the ftp.



Expand the **Scans** folder to view the folder contents.

The top window updates to show the Utilities' folders.

The lower window displays any contents within the Scans folder.

*In the example, there are no documents in the Scans folder.*

*NOTE: An embedded Scan\_Copy folder is housed within the Scans folder. No files should be added to this folder by the user. This is for WPPI internal purposes only.*

