# University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus

## OnBase by Hyland

# OnBase Guide - Naming Conventions

**Goal:** To create a naming convention for the different elements of OnBase so that these elements can be easily recognized and managed both at the campus department level as well as at the university-wide system level.

**Complexity Level:** Departmental Administrative Users, Functional End Users

**10/2/2020**

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# Standard Naming Convention

## <Campus code> - <Department Code> - <Department-level naming>

| Campus Code:<br>One-letter abbreviation for campus (see list below) | Department Code:<br>2-6 letter abbreviation for your department name (see list below) | Department Level Naming:<br>This part of the naming convention can vary depending on the business process, the function, the audience, and varies from dept. to dept. but may require coordination across departments for similar or shared configuration.<br><br>i.e., doc-type name, document name, disk group name, group name, keyword name, queue name. |
|---|---|---|

## Campus Codes:

| | |
|---|---|
| **A** | Anschutz |
| **B** | Boulder |
| **C** | Colorado Springs |
| **D** | Denver |
| **S** | Systems |
| **X** | Not Campus Specific |
| **T** | Trust (not associated with any campus nor exclusively with the University, as they manage healthcare for CU, UPI, and UCH.) |

## Department Codes:

| | |
|---|---|
| **AA** | Academic Advising |
| **AAH** | Art and Art History |
| **ACCTG** | Accounting |
| **ADM** | Admissions |
| **APS** | Astronomy and Planetary Sciences |
| **AS** | Arts and Sciences |
| **AST** | AS Support of Education Technology |
| **ATH** | Athletics |
| **BEN** | Benefits |
| **BUR** | Bursar |
| **BUS** | Business School |
| **CAD** | Cross Area Documents |
| **CCDSMC** | Cancer Center Data and Safety Monitoring |
| **CEPS** | Continuing Education |
| **CIPS** | Center for Integrated Plasma Studies |
| **COB** | College of Business |
| **COE** | College of Education |
| **CON** | College of Nursing |
| **CUSG** | CU Student Government |
| **DATC** | Degree Audit Transfer Credit |
| **DS** | Disability Services |
| **EA** | Education Abroad |
| **ECEE** | Electrical, Computer and Energy Engineering |
| **EEB** | Ecology and Evolutionary Biology |
| **ENG** | College of Engineering |
| **ES** | Employee Services |
| **FA** | Financial Aid |
| **FIN** | Finance |
| **FM** | Facilities Management |
| **GEO** | Geological Sciences |
| **GS** | Graduate School |

| | |
|---|---|
| **GSS** | Graduate Student Services |
| **HON** | Honor Code |
| **HR** | Human Resources |
| **HWT** | Health and Welfare Trust |
| **INTLTX** | International Tax |
| **ISSS** | International Student Services |
| **JUD** | Judicial Affairs |
| **LAW** | Law School |
| **LEEDSMBA** | Leeds MBA Program |
| **LEEDSU** | Leeds Undergrad Academic Advising |
| **LYNX** | Lynx Center |
| **OFA** | Office of Faculty Affairs |
| **OGE** | Office of Global Education |
| **OOTP** | Office of the President |
| **PAF** | School of Public Affairs |
| **PCP** | Pre-Collegiate Dev Program |
| **PES** | Program in Exploratory Studies |
| **PHY** | Physics |
| **PR** | Payroll |
| **PSY** | Psychology |
| **PSYCH** | Department of Psychiatry |
| **REG** | Registrar |
| **RES** | Center for Student Research |
| **RIO** | VC for Research |
| **SA** | Student Affairs |
| **SC** | Staff Council |
| **SDM** | School of Dental Medicine |
| **SEC** | Security Documentation |
| **SEHD** | School of Ed and Human Dev |
| **SOE** | School of Education |
| **SOM** | School of Medicine |
| **SUEP** | Special Undergrad Enrichment |
| **UB** | Upward Bound |
| **VA** | Veterans Affairs |
| **WHS** | Wardenburg Health Services |

# Naming Convention Review

The following reporting dashboards are available to certified admins and contain information relevant to naming conventions:

- **OnBase Naming Convention Review**: lists items that do not adhere to naming conventions and require updates.

- **OnBase Doctypes, Doctype Groups, Keyword Group and AutoName Strings**: lists the auto-name string configured for each document type.
- **OnBase Keyword Type List**: lists existing keyword types (so you can review if one already exists for your need and determine if new keywords should be available for global use or department-specific)

# Detailed Naming Conventions and Examples

Exceptions to standard naming convention are in bold.

## Basic Configuration (Document Types, Keyword Types)

| Configuration Item | Naming Convention to Use | Examples |
|---|---|---|
| Servers (UIS Only) | | https://d02adm01.dev.cu.edu/wiki/index.php/ECS_Naming_Standard#Server_Naming_.28Virtual_or_Application.29 |
| Disk Groups | &lt;Campus code&gt; - &lt;Department Code&gt; - &lt;Department-level naming&gt; | B - ADM - Admissions - Encrypted<br>B - AS - Arts and Sciences – Encrypted<br>B - BUR - Bursar – Encrypted<br>C - AA - Academic Advising – Encrypted<br>C - FA - Financial Aid – Encrypted<br>D - ADM - Admissions - Encrypted<br>D - FA - Financial Aid - Encrypted<br>S - ES – Accounting<br>S - ES – Benefits |
| Document Type Groups | &lt;Campus code&gt; - &lt;Department Code&gt; - &lt;Department-level naming&gt; | B - ADM - App Modification<br>B - AS - Academic Standing<br>B - BUR - SDM & USL<br>B - FA - Loans - Parent PLUS<br>B - REG - Employee Docs<br>C - SEC - Security Documents<br>D - FA - Student Employment<br>S - ES - Benefits Admin |

| Configuration Item | Naming Convention to Use | Examples |
|---|---|---|
| Document Types | &lt;Campus code&gt; - &lt;Department Code&gt; - &lt;Department-level naming&gt; | B - ADM - ACT/SAT Scores<br>B - AS - Diploma Cards<br>B - FA - Award Letter<br>B - REG - Degree Audit – ENGRU<br>C - SEC - FIN Access Rqst<br>D - FIN - GIR Confirmations<br>D - SEC - DM Access Rqst<br>S - ES - BEN - Pension Savings Fact Sheet |
| Document Display Names (Auto-Name String) | Decided upon in a coordinated manner by the departments/units which will be accessing the documents – what naming convention works best for their business purposes within and across documents?<br>**This is not seen by Admin – it only appears in the document hit list or at the top of a document window. Having a similar document name format makes it easier to review lists of documents.** | 123456 - Wendelin, Kimberly - Benefits Enrollments - OE - 4/28/2016<br>Employee ID – Last, First – Document Description – Document Date |
| Autofill Keyword Sets | &lt;Campus code&gt; - &lt;Department Code&gt; - &lt;Department-level naming&gt; | S  - ES - HRMS Status Autofill |
| Keyword Type Groups & Multi-instance Keyword Groups | &lt;Campus code&gt; - &lt;Department Code&gt; - &lt;Department-level naming&gt; | X - FIN - Capital Construction<br>X - CL - Checklist Keywords (EIS)<br>B - BUR - Adjustment Keyword Group |
| Keyword Types (for shared/global keywords applicable to various departments) | Descriptive name | Term Code<br>Date Submitted<br>Secondary Email Address |
| Keyword Types (for non-global, department-specific keyword types) | &lt;Campus code&gt; - &lt;Department Code&gt; - &lt;Department-level naming&gt; | S - HR - Performance Review Year<br>C - BUR - 3rd Party - Sponsor |

| Configuration Item | Naming Convention to Use | Examples |
|---|---|---|
| Keyword Types used as Security Keywords | <Descriptive Name> (SEC-KEY)<br>or<br><Campus code> - <Department Code> - <Descriptive Name> (SEC-KEY) | HCM Department Number (SEC-KEY) |
| Custom Queries | <Campus code> - <Department Code> - <Department-level naming> | All Student Documents<br>All Student Documents – FA<br>All Employee Documents<br>S - HR – Employee File |
| Document Packet Templates | <Campus code> - <Department Code> - <Department-level naming> | A - ISP - Application Export Document Packet<br>D - FA - PJ Child Care Expense Packet<br>D - REG - Residency Petition Document Packet AMC |
| File Cabinets | <Campus code> - <Department Code> - <Department-level naming> | S - ES - Office Management Accounts Payable |
| Folder Types (optional but recommended for child folder types) | <Campus code> - <Department Code> - <Department-level naming> | S - ES - OM - A-Card Purchases<br>S - ES - OM - Purchase Orders |
| Note Types | <Campus code> - <Department Code> - <Department-level naming> | S - ES - Entered into HCM Note |

## Import & Print

| Configuration Item | Naming Convention to Use | Examples |
|---|---|---|
| Processes (DIP, COLD, Document Retention (Date-based), DrIP, Auto Indexers, bar code processes, etc.) | <Campus code> - <Department Code> - <Department-level naming> | S - ES - Monthly Doc Retention Purge |

| Scan Queues | &lt;Campus code&gt; - &lt;Department Code&gt; - &lt;Department-level naming&gt; | B - BUR - OCM Cash Receipts<br>B - FA - Batch Scan Queue<br>S - ES - Front Desk |
| OCR Scan Queues | **&lt;Campus code&gt; - &lt;Department Code&gt; - &lt;State&gt;-&lt;School Name&gt; - &lt;Doc Format&gt;** | D - REG - WA - University of Puget Sound - PDF |
| Print Queues | &lt;Campus code&gt; - &lt;Department Code&gt; - &lt;Department-level naming&gt; | A - SDM - Workstation Printer |
| Print Formats | &lt;Campus code&gt; - &lt;Department Code&gt; - &lt;Department-level naming&gt; | S - PR - W-2 Printing |

## Users & User Groups

| Configuration Item | Naming Convention to Use | Examples |
|---|---|---|
| User Real Name | **First Last - CU[AMC/BLD/DEN/SPG/SYS] Department Description** | Jennifer Abdullahi – CUDEN ADM Student Assistant |
| User Groups (Functional) | **Functional - &lt;Level&gt; - &lt;description&gt;** | Functional - Admin - Records Management<br>Functional - Admin – System<br>Functional - Admin - User Security<br>Functional - Lvl 1 - View Only Users<br>Functional - Lvl 2 - Standard Users<br>Functional - Lvl 3 - Power Users<br>Functional - Lvl 4 - Departmental Admin<br>Functional - Reporting Dashboard Viewer<br>Functional - Workflow |
| User Groups (Personal Pages) | **Personal Page - &lt;Campus code&gt; - &lt;Department Code&gt; - &lt;Department-level naming&gt;** | Personal Page - B - FA – Manager<br>Personal Page - B - FA – Staff<br>Personal Page - S - ES – Benefits<br>Personal Page - S - ES - Payroll |
| User Groups (Reporting) | **Reporting - &lt;Campus code&gt; - &lt;Department Code&gt; - &lt;Department-level naming&gt;** | Reporting - B - BUR - SB Tuition Benefit<br>Reporting - B - FA - Workflow |
| User Groups (Notification only) | **Notification - &lt;Campus code&gt; - &lt;Department Code&gt; - &lt;Department-level naming&gt;** | Notification - B - FA - Schlp Appeal Committee |

| User Groups (Doc Type) | **User Group - <Campus code> - <Department Code> - <Department-level naming>** | User Group - B - AS - Dean<br>User Group - B - ADM - Operations<br>User Group - B - FA - PJ Appeals<br>User Group - B - REG - Imaging Staff |
|---|---|---|
| User Groups (Workflow) | **Workflow - <Campus code> - <Department Code> - <Department-level naming>** | Workflow - B - BUR - Conversion 3rd Party<br>Workflow - B - FA - Admin Staff<br>Workflow - B - FA - Processing Students<br>Workflow - S - ES - Benefits Appeal<br>Workflow - S - ES - W-2 Reissue |
| User Groups (Scan Queue) | **Scan Queue - <Campus code> - <Department Code> - <Department-level naming>** | Scan Queue - B - BUR - OCM - Cash Receipt<br>Scan Queue - B - FA - All Scan Queues<br>Scan Queue - B - REG - Employee Docs<br>Scan Queue - T - HWT - Health Care Trust |
| User Groups (Security Keyword) | **Security Keyword - <Campus code> - <Department Code> - <Description>** | Security Keyword - B - HR - Human Resources<br>Security Keyword - S - ES - Employment Services |
| User Groups (WorkView) | **WorkView - <Campus code> - <Department Code> - <Department-level naming>** | WorkView - S - ES - Physical Records Admin<br>WorkView - S - ES - Physical Records |
| User Groups (Unity Script Development) | **Unity Script - <Campus code> - <Department Code> - <Department-level naming>** | |
| User Groups (Doc Comp Admin) | **Doc Comp - <Campus code> - <Department Code> - <Department-level naming>** | Doc Comp – S – ES – Template Group |

## Unity Forms

| Configuration Item | Naming Convention to Use | Examples |
|---|---|---|
| Unity Form Templates | <Campus code> - <Department Code> - <Department-level naming> | B - FA - Parent Assets Form Even<br>C - ADM - Student Update Form |
| Unity Form Data Sets | <Campus code> - <Department Code> - <Department-level naming> | B - ADM - Decision Sheet Category<br>D - REG - Residential Information |
| Unity Form Integrations | <Campus code> - <Department Code> - <Department-level naming> | X - X - Pull SID form Portal<br>B - EA - Student ID from TDS |

| Custom Actions | Department level naming | |
|---|---|---|

## Reporting Dashboards

| Configuration Item | Naming Convention to Use | Examples |
|---|---|---|
| Reporting Dashboards | <Campus code> - <Department Code> - <Department-level naming> | B - BUR - Late & Finance - Stats LR<br>B - FA - File Types |
| Data Providers | <Campus code> - <Department Code> - <Department-level naming> | B - ADM - College Transcript Queue Stats<br>D - LYNX - Appeal Stats<br>X - UIS - Keyword Type Configuration |
| Reporting Dashboard Categories | <Campus code> - <Department Code> - <Department-level naming> | B - BUR - Student Billing Reports |
| Reports | <Campus code> - <Department Code> - <Department-level naming> | C - ADM - Criminal Clearance Report<br>B - HR - Avature Offer Letter Verification Report |

## Workflow

| Configuration Item | Naming Convention to Use | Examples |
|---|---|---|
| Workflow Lifecycles | <Campus code> - <Department Code> - <Department-level naming> | S - ES - INTLTX - AP Processing |
| Workflow Queues | **<Campus code> - <Department Code> - <workflow lifecycle name> - <Department-level naming>** | S - BEN - Benefit Enrollment - HSA Enrollment Hold Queue |
| Workflow Timer | <Campus code> - <Department Code> - <Department-level naming> | B - REG - COM - Daily Timer |
| Email Notifications/ Workflow Notifications | **<Campus code> - <Department Code> - <workflow lifecycle/process name/abbreviation> - <Department-level naming>** | S - BEN - Tuition Waiver - Insufficient Credits |

| Scheduler Tasks | **<Campus code> - <Department Code> - <workflow lifecycle name/abbreviation (if applicable)> - <Department-level naming>** | B - CEADM - TPPU - Check for App Restart<br>B - REG - AMEN - Daily Timer |
|---|---|---|

## Studio Items

| Configuration Item | Naming Convention to Use | Examples |
|---|---|---|
| Roles | <Campus code> - <Department Code> - <Department-level naming> | D - REG - TAB Notification<br>S - ES - Payroll Counselors |
| Item Generator/Item Generator Sets | <Campus code> - <Department Code> - <Department-level naming> | B - BUR - Forms<br>S - ES - Subpoenas<br>S - ES - Legal Requests<br>T - HWT - Student Insurance |
| Portfolio Type/Portfolio Relations | <Campus code> - <Department Code> - <Department-level naming> | D - FA - Eligibility MISC<br>S - ES - Overpayment |

## Scripts

| Configuration Item | Naming Convention to Use | Examples |
|---|---|---|
| Unity Scripts | **<Campus code (if applicable)> - <Department Code (if applicable)> - <Data Source (if applicable)> - <Department-level naming>**<br><br>**Note: It's not necessary to identify workflow vs. Unity forms unless the same name is being used for both type of script since two scripts cannot have the same name.** | B - MSEE - ICS - Get Enrolled Courses<br>D - FA - ICS - Overaward Summer<br>GEN - ICS - Update Email Address<br>GEN - ICS - Update Email Address [UNITY FORM] |

| | | |
|---|---|---|
| VB Scripts | <Campus code> - <Department Code> - <Department-level naming> | |
| Scheduler Tasks | <Campus code> - <Department Code> - <Department-level naming> | B - CEADM - TPPU - Check for App Restart<br>B - REG - AMEN - Daily Timer |

## WorkView

| Configuration Item | Naming Convention to Use | Examples |
|---|---|---|
| WorkView Application | <Campus code> - <Department Code> - <Department-level naming> | S - ES - Physical Records Management |
| WorkView Class* | **<Campus code><Department Code><Department-level naming>**<br>Spaces and special characters not allowed in class name. Edit display name after creation of class if desired. | SESContainerType<br>SESStorageLocation |
| WorkView Attribute | Department-level naming | |
| WorkView Filter* | **<Campus code> - <Department Code> - <ADMIN/UI/EMB/LU> - <Department-level naming>**<br>Use one of the following to indicate filter usage:<br>ADMIN - all attributes<br>UI - user interface<br>EMB - embedded<br>LU - lookup | |
| WorkView Filter Bars | <Campus code> - <Department Code> - <Department-level naming> | |
| WorkView View | <Campus code> - <Department Code> - <Department-level naming> | S - ES - Container Type View |
| WorkView Notification | <Campus code> - <Department Code> - <Department-level naming> | |
| WorkView CSS Class | **<Campus code>-<Department Code>-<Department-level naming>**<br>(no spaces allowed in CSS Class name) | |

| | | |
|---|---|---|
| WorkView Actions | <Campus code> - <Department Code> - <Department-level naming> | |
| WorkView Screens | <Campus code> - <Department Code> - <Department-level naming> | |
| WorkView Folders | <Campus code> - <Department Code> - <Department-level naming> | |
| WorkView Keyword/Document Type Mappings | <Campus code> - <Department Code> - <CREATE or SEARCH> - <Department-level naming> | C - HR - SEARCH - Related items by Employee ID |
| WorkView Triggers | <Campus code> - <Department Code> - <Department-level naming> | |
| WorkView Sequence | **<Campus code><Department Code><Department-level naming>** (no spaces or special characters allowed) | |
| WorkView Timers | <Campus code> - <Department Code> - <Department-level naming> | |
| WorkView Calendar | <Campus code> - <Department Code> - <Department-level naming> | |

*Applies to Name only. Display name can exclude the naming convention prefix.

## Document Composition

| Configuration Item | Naming Convention to Use | Examples |
|---|---|---|
| Template Group Name | <Campus code> - <Department Code> - <Department-level naming> | |
| Document Composition Templates | <Campus code> - <Department Code> - <Department-level naming> | |
| Document Composition Fragments | <Campus code> - <Department Code> - <Department-level naming> | |

## Document Retention & Records Management

| Configuration Item | Naming Convention to Use | Examples |
|---|---|---|
| Retention Plans (Records Management – Event-based) | <Campus code> - <Department Code> - <Department-level naming> | S - ES  - 10-year Retention |
| Retention Plan Events/Event Sets (Records Management – Event-based) | <Campus code> - <Department Code> - <Department-level naming> | S - ES -  Employee Record Retention Plans |
| Retention Plan Holds/Hold Sets (Records Management – Event-based) | <Campus code> - <Department Code> - <Department-level naming> | S - ES -  Legal and Accounting Holds |
| Document Retention Processes | <Campus code> - <Department Code> - <Department-level naming> | S - ES - 4-year Retention |

## ShareBase

| Configuration Item | Naming Convention to Use | Examples |
|---|---|---|
| Library | <Campus code> - <Department Code> - <Department-level naming> | D - ADM - Denver Admissions |
| ShareBase Profile | <Campus code> - <Department Code> - <Department-level naming> | D - ADM - Denver Admissions |