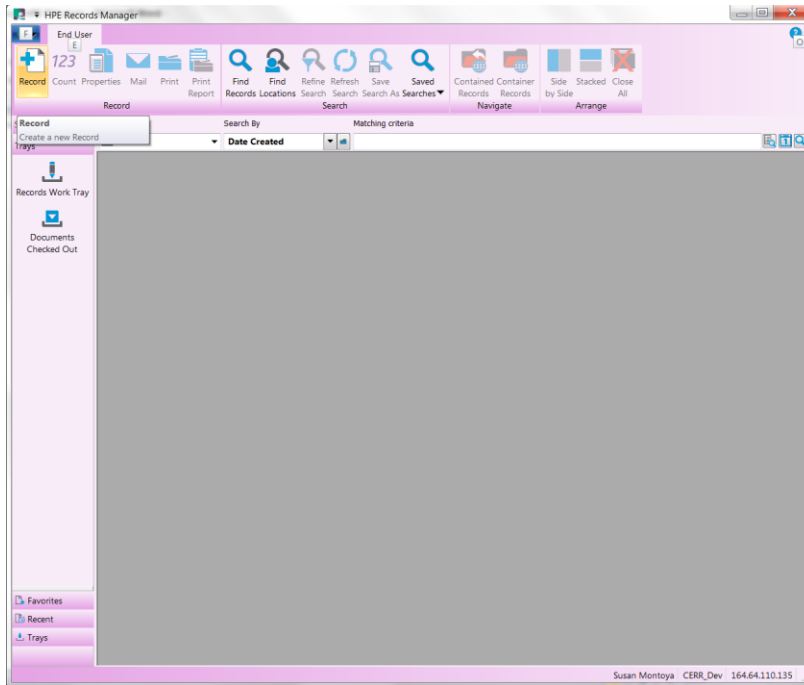


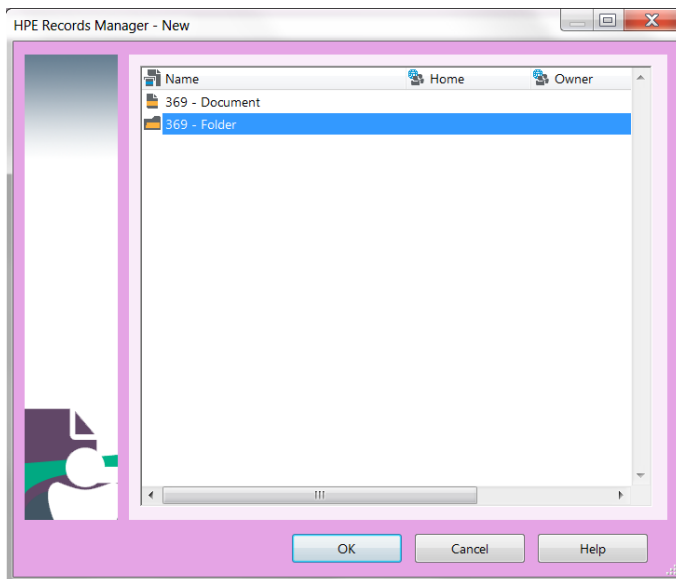
File Creation and Naming Convention (in HPE RM)

File Creation in HPE RM

Prior to establishing links between folders to contribute content to the CERR, folders must be created in HPE RM. To create a folder in HPE RM, click on the new record icon.

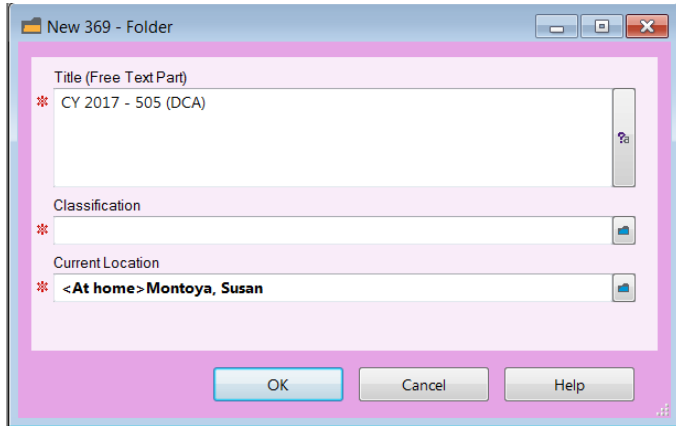


Select the "369-Folder" record type and click ok.

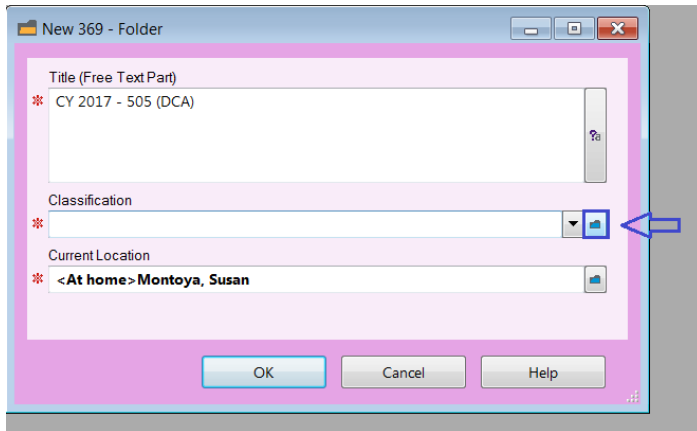


File Creation and Naming Convention (in HPE RM)

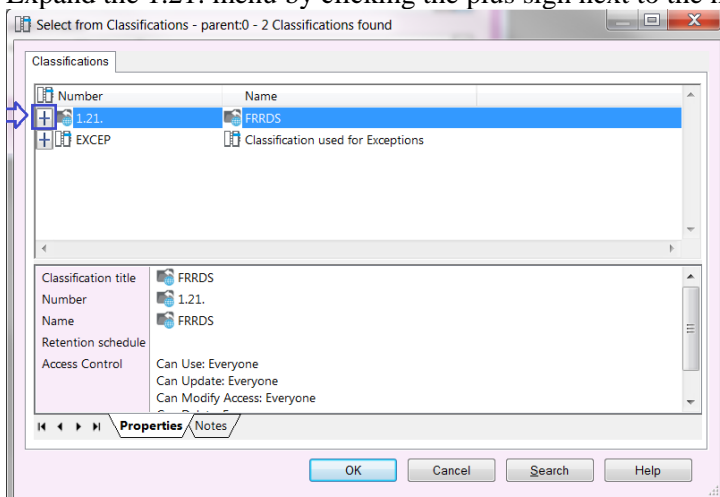
Enter the Title of the folder in accordance with the established naming convention within the CERR (for guidance refer to the section of this document titled “Naming Convention”).



Select the classification of the records which will be contained in this folder. (For assistance with classification, please contact an agency analysis bureau analyst.) General correspondence will be used as an example in this guide. To navigate to the classification, click on the kwikselect button next to the classification field.

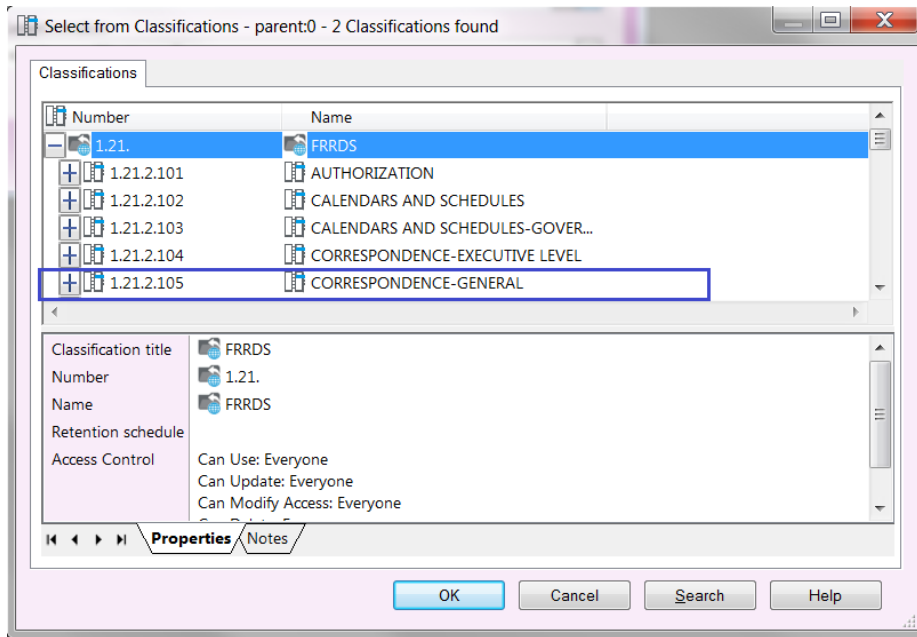


Expand the 1.21. menu by clicking the plus sign next to the number.

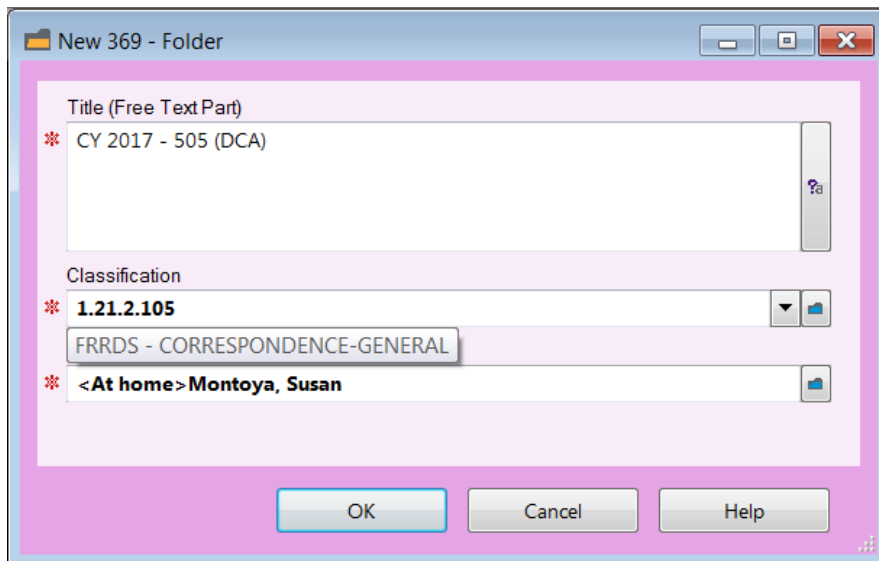


File Creation and Naming Convention (in HPE RM)

Select 1.21.2.105 Correspondence-general from the list and click ok.

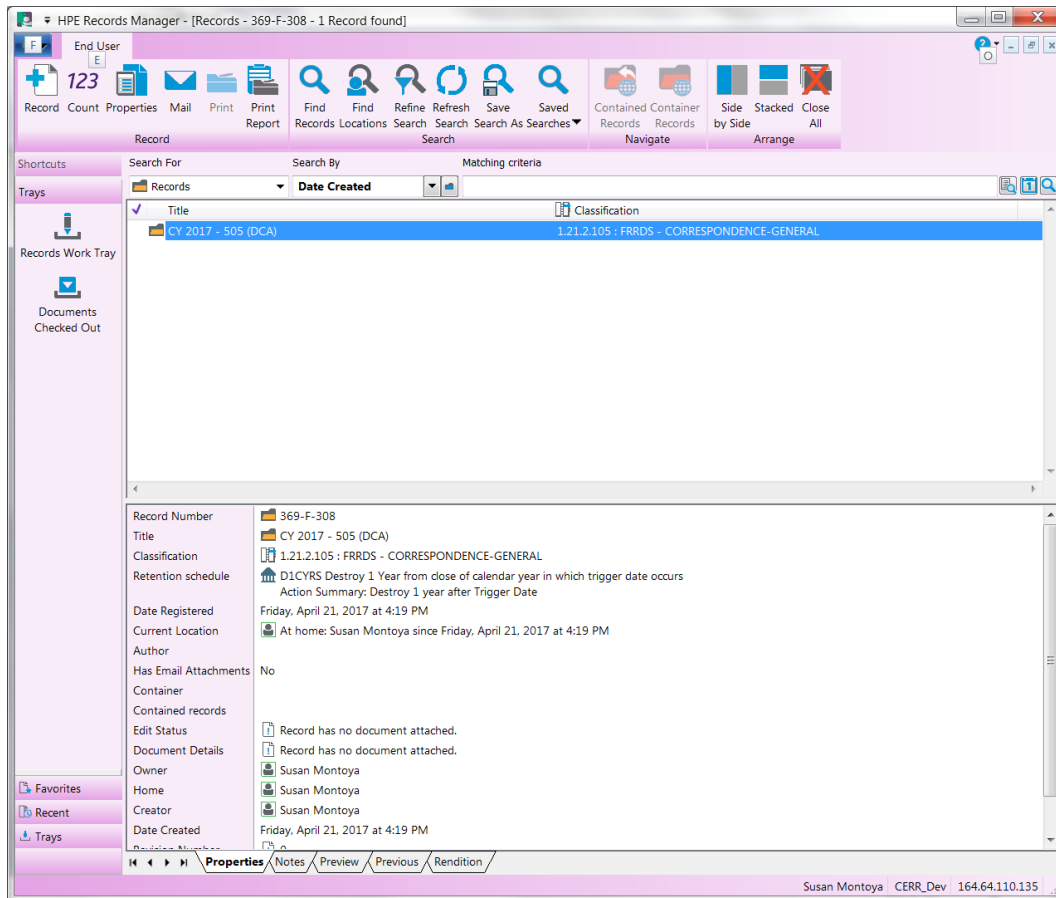


Once you have completed all of the fields on the form, click ok.



File Creation and Naming Convention (in HPE RM)

The new folder should look like this in HPE RM.



Repeat the process until all of your back end folders have been created. For ease of access when linking, make note of the record number associated with each folder.

File Creation and Naming Convention (in HPE RM)

Naming Convention

Standard naming convention (HPE RM) is a condensed version of the front end naming convention and should contain the trigger event associated with the selected classification, followed by a descriptor to assist with navigation. For example, in outlook the subfolder beneath general correspondence is named by calendar year, and the sub beneath it used for navigation is named based on point of origin. So the subfolder within the 2017 correspondence titled 505 (DCA) would have a corresponding folder in HPE RM titled CY 2017 – 505 (DCA). These examples should be followed when naming files in HPE RM:

Correspondence (Exec. & Gen.)

CY YYYY – Point of Origin*

Project Files

Project Name – Subject*- Optional Secondary*

Grant Administration

FFY YYYY – Grant Name – applicant*