Naming OneSpan Transactions

Senders are encouraged to establish naming conventions for transactions that identify the business process or documents in the transaction. This will help the sender quickly and easily identify the correct transaction in the eSignature portal.

Naming Convention Recommendations:

1. Name should be unique.
2. Name should contain information about the content of the documents.
3. Naming needs to be consistent.

Examples:

If the transaction is an application renewal. The naming convention could be:

- *Application Renewal – Entity Name + Year*
- *Application Renewal – Mid Michigan Heating 2020*

If the transaction is an alternate work schedule request. The naming convention could be:

- *Alternate Work Schedule Request – Employee Name + Year*
- *Alternate Work Schedule Request – Jennifer Green 2020*

If the transaction is a form. The naming convention could be:

- *Form Number – Name or ID number of entity (person, company, etc.)*
- *DTMB-160 – DeMelloR*

Note:

The transaction name appears in the email invitation to signers. Do not put any confidential or sensitive personal identifying information in the transaction name.

Need Assistance?

DTMB Records Management Services can help agencies develop naming conventions for their transactions. Please contact the help desk at dtmb-imagingservices@michigan.gov for assistance.