

# Naming Conventions Policy

## 1 Purpose

- 1.1 The objective of this policy is to establish guidelines for a common set of rules to apply to the naming of Town records. Employees generate multiple documents daily, and adopting appropriate naming practices ensures consistency in document organization. This, in turn, facilitates quick retrieval during searches and significantly diminishes the likelihood of duplicative efforts.
- 1.2 The subsequent best practice aims to offer a comprehensive guideline and exemplify proper naming conventions.

## 2 Policy Statement

- 2.1 Naming records consistently, logically and in a predictable way will distinguish similar records from one another at a glance, and by doing so will facilitate the storage and retrieval of records, which will enable users to search and retrieve records more effectively and efficiently.

## 3 Application

- 3.1 This policy applies to all Town of Fort Erie employees.

## 4 Background

## 5 Policy

- 5.1 Short but Clear
  - Document names should be concise while maintaining clarity and usability. It's crucial to avoid the use of initials, non-standard abbreviations, codes, or obscure acronyms that may not be understood by most users.
  - Certain words can add unnecessary length to a document name without enhancing its meaning. Steer clear of verbs, adverbs, adjectives, and empty words ("the," "a," "an," "my," "mine," "and," "or," etc.).
  - To prevent an increase in file path length, it's advisable to eliminate repetition and redundancy in document names. Therefore, a document name should not duplicate information already present in the folder where it is stored.

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## 5.2 Order the elements

- The elements to be included in a document name should be ordered according to the way in which the document will be retrieved during the course of the day to day business, how this is implemented will invariably depend of the way you work.
- For example, if a document is usually retrieved according to its date, then the date element should appear first. If, on the other hand, the document is retrieved according to its description, then the description element should be listed first.
  - /.../ meeting/2020-06-30 Agenda
  - /.../meeting/2020-06-30 Minutes
  - /.../meeting/2021-01-20 Agenda
  - /.../meeting/2021-01-20 Minutes
  - /.../Events/Charity Ball 2023-11-30
  - /.../Events/Retirement 2023-11-25
  - /.../Events/Carnival 2024-01-23
- In the initial example, we have minutes and agendas from a unit meeting. Given that the retrieval of meeting agendas and minutes often depends on the meeting date, it is advisable to place the date at the beginning of the file name. This arrangement ensures that when files are listed, items are ordered chronologically, with agendas and minutes grouped together. Otherwise, without the date at the start, all agendas may appear first in the list, followed by all minutes, creating a less organized structure.
- The second example shows the document names of the documents in the Events folder. Events are likely to be retrieved by the name of the event rather than the date of the event, hence more useful to have that element first.

## 5.3 Names

People's Names should be written as Last name First initials.  
Example: \* Carter A

## 5.4 Correspondence

Correspondence should be written with the name of the correspondent, and indication of the subject, the date of the correspondence, and whether it is incoming or outgoing.

Example: \* Carter A employment offer 2023-11-22

## 5.5 Version and status

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The version and/or status of the document should be added at the end of the name by adding “v” followed by the digit of the number of the version, and, if applicable, the status of the files (draft, final, accepted, refused, approved, etc.).

## 5.6 Upper case vs lowercase

Use all lower-case letters, with spaces between to differentiate between words, not underscores, or hyphens. Upper case letters can be used for proper names, as well as abbreviations/acronyms.

## 5.7 Spaces and separators

Only use hyphens to separate elements of a date. Avoid using hyphen, underscores or any other characters to separate elements of a name, since this will limit your search results.

## 5.8 Numbers

Use a “0” in front of all numbers from 1 to 9 in order to ensure their numeric sort. Two zeros “00” are used if the numbers are expected to exceed 99 and three zeros “000” if they are expected to exceed 999.

## 5.9 Dates

When using the date as part of a document’s name, use the YYYY-MM-DD date format. In general, dates should be at the end of the name, but can be placed at the beginning to facilitate ordering in chronological order. This can be useful for minutes, agendas, etc.

## 5.10 Commonly used abbreviations and acronyms

The following is a short list of some of the commonly used abbreviations<sup>1</sup>.

Table 1 - Word Abbreviations

Full word	Abbreviation
Administrative	ADMIN
Agenda	AGD
Account payable	AP

<sup>1</sup> For more commonly used abbreviations, please consult: <https://public.oed.com/how-to-use-the-oed/abbreviations/>

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Full word	Abbreviation
Appointment	APPT
Architecture	Arch
Building	BUILD
Certificate	CERTIF
Committee	COMM
Contract	CON
Department	DEPT
Directive	DIR
Expense	EXP
Finance	FIN
Form	FRM
Fiscal Year	FY
Frequently Asked Question	FAQ
Letter	LETR
Minutes	MIN
Miscellaneous	MISC
Meeting	MTG
Number	NO
Organization	ORG
Plan	PLN
Purchase order	PO
Policy	POL
Project	PRJ
Report	RPT
Statistics	STATS
Standard Operational Procedures	SOP
Work Order	WO
Year end	YE
January	JA
February	FE
March	MR
April	AL
May	MA
June	JN
July	JL
August	AU
September	SE
October	OC
November	NO

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Full word	Abbreviation
December	DE

## 6 Responsibilities

### 6.1 Town Clerk shall:

6.1.1 Review this Policy on a regular basis and amend as needed.

### 6.2 All Employees shall:

6.2.1 Familiarize themselves and comply with this Policy

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