



# Archdiocesan Naming Convention

## **Abstract**

The Archdiocesan Naming Convention has been developed to assist with the effective management of Documents and Records stored in the Archdiocese's Electronic Document and Records Management System (EDRMS) – Laserfiche.

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## Approval and Implementation

Approval Authority:	Archdiocesan Archivist and Director Archives Office
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## Document Control

Approved/Amended/Rescinded	Date Approved	Effective Date	Next Review Date
Approved	3 September 2021	3 September 2021	3 September 2022

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## Overview

**The Archdiocesan Naming Convention has been developed to assist with the effective management of Documents and Records stored in the Archdiocese’s Electronic Document and Records Management System (EDRMS) – Laserfiche.**

Document Naming Conventions are critical to effective records management. They enable users to locate and decipher exact documents with minimal time and effort. These guidelines are for naming electronic documents captured in an EDRMS, Business Information System or shared drive.

Document names should be as concise as possible, while providing sufficient, relevant information. Ideally, the content of document should be identifiable, without needing to open it.

## Order of Title Fields

**Order the sections of categories of information in a logical sequence. For recurring or time specific activities begin with the date, followed by the name of the activity. For activities that are infrequent, begin with the name followed by the date.**

See examples below:

2019-6-23 Minutes	Not	Minutes 23 June 2019
2019-7-05 Agenda and notes		Agenda & notes 5-7-2019
Strategic plan_2015-2020		2015-2020_Strategic plan

## Terminology

### Synonyms, Acronyms and Abbreviations

Avoid the use of synonyms by using the (Business Classification Scheme) activity terms for each business unit. (Folder scope notes explain how the terminology is used.)

For example, the Griver House Business Classification Scheme uses “People Management” rather than “Staff Management” or “Personnel Management”.

Avoid the use of acronyms and/or abbreviations for organisation names and activities, as their meaning can change over time, making it difficult to locate records and documents. Where necessary, such as frequent use within a Business Unit, use acronyms from an approved list.

The use of Acronyms is repeated in Personal Names.

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## Metadata

Laserfiche has templates within the system which have been designed to capture the metadata that is required for the long-term retrieval of information. The range of metadata that is required is set out in the Archdiocese's Information Management Policy

### Initial Articles

Avoid the use of initial articles (the, an, a) unless they form part of a proper noun. In emails, remove the 'Re:'.

See examples below:

Archdiocese of Perth_Newsletters	Not	The Archdiocese of Perth_Newsletters
The Record_Sales		Record_Sales
The Record_Sales		Re: The Record_Sales

### Formats

Begin with the main activity or subject key word followed by the secondary activity or subject key word.

See examples below:

Records Management Implementation_DRAFT	Not	Draft_Records Management Implementation
Records Management Training MEMO_		Memo_Records Management Training
Recordkeeping Plan V1.0_FINAL		Final_Records Management Strategic Plan

### Dates/Numbers

Ideally dates should follow the ISO 8601 standard of YEAR-MONTH-DAY in the format XXXX-XX-XX. This files documents in chronological order.

See examples below:

2015-05-25	Not	25th May, 2015
2016-03-29		29 March 16
2019-12-06		December 6, 2019

Drafts or version numbers are not required on file titles as they can be identified automatically through Laserfiche metadata functions.

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## Personal Names

As a general rule, names should be filed as Surname, First name. Include middle names or initials if there is more than one person with the same name in the organisation. Laserfiche has a name registry which will help determine whether a name already exists.

When entering a personal name, the name must be copied exactly, including any punctuation such as hyphens or apostrophes. Decide on the most appropriate case for your business purposes. E.g. Sentence case, Title Case, UPPER CASE.

### **Titles or post-nominatives should precede the first name**

See examples below:

SIMPSON, Fr Fred	Not	Fr Fred Simpson
Green, Joseph		J. Green
Parker, Sarah		Sarah P.

## Company/Business Names

Enter organisation and company names the way they appear on their letterhead, signature block or brand. Do not use acronyms alone unless specified on your organisation's approved abbreviations and acronyms list. Otherwise, acronyms can be inserted in brackets where necessary.

See example below:

Catholic Archdiocese of Perth Administration Centre (CAPAC)
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## Special Characters

- » The underscore ( \_ ) is a quasi-standard for separation of words or a group of words.
- » Capitalise the first letter of each word within a field.
- » Use the hyphen ( - ) to separate numbers within a field.
- » Avoid using special characters such as: ? / \$ % & ^ #. These may be confused with 'wild cards' or search operation terms by the system.
- » Full stops should not be used within the title.



### References

State Records Office of Western Australia

### Further Information

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