Naming Convention Basics

The special characters we **cannot** use:
- Comma (,)
- Plus sign (+)
- Double quotes (")
- Backward slash (\)
- Less than (<)
- Greater than (>)
- Semi-colon (;)

Also, we cannot use
- Hashtag (#) as the first character
- A space ( ) as the first or last character

Naming Convention Standards

These are standards we will work to implement both on worktags already created as well as any new requests.
- Any mention of Diversity, Equity, Inclusion in any worktag: we will ensure DEI is showing in the worktag description, so we can pull information DEI across the institution, but recognizing that DEI may be cost centers, programs, and/or activities in various units.
- Including names in worktags:
  - Names in Assignee:
    - 999999999 Last First (mvj6l)
    - 888888888 Roberts Sally (sor7v)
  - Names in Project for Faculty Funding (a General Use example and a Start-Up example):
    - PJ00998 AS-General Use 999999999 Last First (mvj6l)
    - PJ00999 AS-Start-Up 888888888 Roberts Sally (sor7v)
  - Names in Activity (examples of additional information to combine with Designated):
    - AC00997 AS-Intellectual Property 999999999 Last First (mvj6l)
    - AC00996 AS-Patent Royalty 888888888 Roberts Sally (sor7v)
  - Use Assignee with another worktag:
    - For example, you might want to distribute Relocation or Professional Development. Then, use the Assignee to connect the funding to an individual.
- Suspense and Clearing Accounts - to be housed in **Program** worktag.
  - Every unit should consider creating suspense codes for labor and OTPS in the following format (example is from Law School). Suspense codes are intended to catch errors and to be cleared monthly.
    - PGxxxxx LW-Suspense Labor
    - PGxxxxx LW-Suspense OTPS
  - Clearing accounts within units are used as holding places until expenses can be moved. Unlike suspense, they are not errors. The most common example tuition remission clearing, to be used to hold tuition remission and health insurance subsidy costs related to graduate students working on grants, where the full cost cannot be moved to the appropriate grant until they have appropriate GRA wages charged to the grant, over a semester (remission) or year (insurance).

- PGxxxxx ED-Tuition Remission Clearing
  - PG00847 was created centrally and is to be mapped to inactive PTAOs. This will be deactivated after stabilization and is solely meant to facilitate transitioning from the PTAEO structure to the FDM.

Other Best Practices

- Remember, we have 12 worktags to include in reports (12 columns); consider how the length of your worktag descriptions will affect your reporting. This includes:
  - The number of characters you use
  - Avoiding spaces around hyphens (e.g., International Programs-China instead of International Programs - China)
- We are an institution with cross-unit activities and employees who both come in new and/or transfer across units. Consider whether your tags are meaningful and where acronyms should be used versus avoided.