

Appendix B

General File Naming Conventions for Filing

Background

A file name is the chief identifier for an electronic record; a record's file name provides information that help staff to locate and retrieve records within PRSD's electronic records management system. Consistency and accuracy within this system is key to successful records management. Properly named records enable efficient daily business operations and also help to meet legal requirements.

To ensure the efficient searching and retrieval of records, a standard of naming for files stored in the electronic records system shall be utilized by all staff. Certain information is vital in the naming of a record. This document outlines that information, as well as specifies the format for certain filename components.

Process

- 1. Confirm that the record is the final, complete version.**
- 2. Determine if a naming convention for the record in question has been used previously. If so, follow that filename.**
- 3. Filenames should contain enough information that any staff member will be able to look at a record's file name and use that information to recognize the contents.** Generally speaking, the file name should include an indication of WHO/WHAT the record references, the SUBJECT/DESCRIPTION of the record and the DATE of WHEN that record is most relevant to divisional operations.

Use the following suggested components to name the document.

Who/What

- Name of group associated with the record (e.g., Wellness Committee OR ASBA Zone 1 [refer to attached list of commonly used PRSD abbreviations if necessary])
- Site or Location abbreviation (e.g., EE or 22 for E.E. Oliver School)
- refer to attached list of commonly used PRSD abbreviations/codes
- Department Identification number (e.g., HR or FM or TR)
- Records series (e.g., HR-00-02)
- Name of creator (e.g., SmithAd OR JohnsonA; use login username)

Subject/Description

- Title of content (e.g., School Emergency Plan OR Joint Use Agreement EEO)
- Subject lines of letter or email
- Work order, Invoice, Project or Contract number

When

- Date document was created, published, accepted, or received.
(e.g., YEARMMD(Mon) e.g. 20170122 OR YEARMonDD e.g. 2017Jan22)
- School year (e.g. 2017-2018)

- 4. Order the elements in a file name in the most appropriate way to retrieve the record, with the most important element first** (for example, chronologically organized records should have the date first, then description such as *20170715(Jul) PRSD Letter to Parents re: School Startup*; records that

are alphabetically organized should have the identified person/group's name, then description and perhaps date if relevant e.g. *SmithJason Letter re: Board of Trustees 2017Jul15*. **Keep the components in this order for any records that are filed in similar location/manner for consistency. (again, if other records have been filed in similar location before you, utilize that naming convention).**

5. It is recommended that files kept on working drives be named to correspond to the file name given for records management.

6. When naming a record consider the following:

- Keep file names short, but comprehensible, using commonly recognised acronyms or abbreviations where appropriate.
- Create unique file names. Duplicate file names will cause confusion.
- Use only alpha-numeric characters (avoid using special characters such as: ? / \$ & ^ # . \ : >)
- Use leading zeros with the numbers 0-9 to facilitate proper sorting and file management.
- Dates should follow the standard of **YYYYMMDD(Mon)** if documents are filed chronologically OR **YYYYmonDD** in all other cases. In both formats the "Mon" is the first three letters of the month. This is to avoid confusion between numbering of the day and the month.
- If necessary, include the version number in the file name by using 'v' or 'V' and the version number at the end of the document. (Ex: 2004 Notes v01)
- Order the pieces of information or elements being used to create the file name in the most logical order based on retrieval methods. For example, use the date first on events that are time specific or reoccurring, and use the name of the event for events that are infrequent and will be easier to find by name rather than date
- Know the collection that the record will be filed in – if the record's collection name or location within the records system indicates information that describes the record, you may wish to use an acronym or leave out extraneous information.

The following are examples of proper file naming:

General Documents:

YEARmonDD DocumentType SubjectName

ie, 2014Dec01 JonesJ Suspension.pdf

TR-00-04 2013Sep30 Minutes TLC Meeting

1989Mar07 Field Field & Field Cost Estimate Menno Library Addition

Student Records:

Student Record Folders are named according to the Student's Alberta Student ID Number.

CUM Records will be named: YEAR Last Name, First Middle, Birthdate, File Name

i.e.: 2017-2018 Smith, Johnny Doe, 2000Dec01, BirthCert

Any other student file MUST contain the student's ASN OR Birthdate and First/Last Name.

Agreement or Contracts:

Partner Name Location Title or Description of the Contract or Agreement Type of Agreement

ie, Hi-Tech Kennedy Photocopier Supply & Service Agreement

Town of Fairview EE Oliver Joint Use Agreement

Holy Family Catholic Regional Division Bus Services Transportation Agreement Amendment

Bear Canyon Colony School 2015-2016 Payment for Educational Services Letter of Understanding

Note: Agreements or contracts are typically filed by the Admin Assistant/Records Manager.

Naming Conventions for Schools:

School	Finance	SIS	Records
Bear Canyon Colony	23	1985	BC
Breaking Point Colony	29	1051	BP
Cleardale Colony	28	1045	CC
Dixonville School	10	1504	DX
EE Oliver Elementary	22	1404	EE
Fairview & Area Learning Store	11	1542	FL
Fairview High School	21	1402	FH
Grimshaw Jr/Sr High School	06	1505	GH*
Grimshaw Public School	04	1505	GP
Hines Creek Composite School	24	1405	HC
Kennedy Elementary School	07	1516	KE*
Lloyd Garrison School	08	1501	LG
Manning Elementary School	13	1508	MA
Menno Simons Community School	26	1825	MS
Nampa Public School	01	1510	NA
Paul Rowe Jr/Sr High	12	1507	PR
Peace River High School	02	1511	PH
Peace Regional Outreach Campus	09	1376	PO
Red Earth Creek School	27	0339	RE
Springfield Elementary School	05	1514	SP
T.A. Norris Middle School	03	1512	TA
Worsley Central School	25	1407	WO

Education Acronyms

AAC Alberta Assessment Consortium
AADAC Alberta Alcohol and Drug Abuse Commission
AAMDC Alberta Association of Municipal District and Counties
ABC Association for Bright Children
ACFA Alberta Capital Finance Authority
ACLD Association for Children with Learning Disabilities
ACOL Alberta Commission on Learning
ACSTA Alberta Catholic School Trustees' Association
ADD Attention Deficit Disorder
AD/HD Attention-Deficit/Hyperactivity Disorder
ADL Alberta Distance Learning
ADLC Alberta Distance Learning Centre
ADM Assistant Deputy Minister
ADSA Alberta Debate and Speech Association
AE Alberta Education
AERR Annual Education Results Report
AETS Alberta Electronic Tendering System
AFS Audited Financial Statements
AHSCA Alberta Home and School Councils' Association
AI Alberta Infrastructure
AISI Alberta Initiative for School Improvement
AIT Agreement on Internal Trade
ALARIE Alberta Local Authorities Reciprocal Insurance Exchange
AMHSA Alberta Municipal Health and Safety Association
AOD Accumulated Operating Deficit
AOS Accumulated Operating Surplus
APAR AISI Project Annual Report (years 1 & 2)
APC Alberta Purchasing Connection
APFR AISI Project Final Report (year 3)
AP Advanced Placement
ARND Alcohol-Related Neurodevelopmental Disorder
ASAA Alberta School Athletic Association
ASBA Alberta School Boards Association
ASBCA Alberta School Bus Contractors' Association
ASBIE Alberta School Board Insurance Exchange
ASBO Association of School Business Officials International
ASBOA Association of School Business Officials of Alberta
ASCA Alberta School Councils Association
ASEBP Alberta School Employee Benefits Plan
ASFF Alberta School Foundation Fund
ASL Alberta Student Link
ASN Alberta Student Number

ASTAC Alberta Student Transportation Advisory Council
ATA Alberta Teachers' Association
ATLE Alberta Technology Leaders in Education
ATRF Alberta Teachers' Retirement Fund
AUMA Alberta Urban Municipalities Association
AUPE Alberta Union of Public Employees
AV Audio Visual
BLIMS Building Land Information Management System
BR Budget Report
BSP Behavioural Support Plan
CAI Computer Aided Instruction
CALM Career and Life Management
CASA Canadian Association of School Administrators
CASE Coordinated Assessment Services for the Exceptional
CASS College of Alberta School Superintendents
CAT Canadian Achievement Test
CBA Custody by Agreement
CD Conduct Disorder
CEA Canadian Education Association
CEFPI Council of Educational Facility Planners International
CEO Chief Executive Officer (Superintendent of Schools)
CEU Credit Enrolment Unit
CFSA Child and Family Services of Alberta
CICA Canadian Institute of Chartered Accountants
CIDS Course Information Database System
CIF Classroom Improvement Fund
CITT Canadian International Trade Tribunal
CO Central Office
COATS Council of Alberta Teaching Standards
CSC Council of School Councils
CPF Canadian Parents for French
CSA Canadian Standards Association
CSBA Canadian School Boards Association
CSBO Certified School Business Official
CTS Career and Technology Studies
CUPE Canadian Union of Public Employees
DIP Diploma
DPA Daily Physical Activity
DRT Digital Resource Team
DSEPS Designated Special Education Private Schools
EA Educational Assistant
EAP Employee Assistance Program
EBS Effective Behaviour Supports

ECS Early Childhood Services
EFAP Employee Family Assistance Program
ELI Early Literacy Initiative
ERP Enterprise Resource System
EAL English as an Additional Language
ESL English as a Second Language
FAS Fetal Alcohol Syndrome
FASD Fetal Alcohol Spectrum Disorder
FCSS Family and Community Social Services
FEA Francophone Equivalency Access
FES Funding Events Systems
FFRC Funding Framework Review Committee
FI French Immersion
FNMI First Nations Métis Inuit
FOIPP Freedom of Information and Protection of Privacy
FOPS Family-Oriented Programming Sessions (PUF)
FRA Financial Reporting and Accountability
FSL French as a Second Language
FTE Full Time Equivalent
GAAP Generally Accepted Accounting Principles
GAAS Generally Accepted Auditing Standards
GLA Grade Level of Achievement
GLAR Grade Level of Achievement Reporting
GRE Government Reporting Entity
GRF General Revenue Fund
HFCRD Holy Family Catholic Regional Division
HR Human Resources
IB International Baccalaureate
ICA Investment in Capital Assets
ICoach – a teacher who works with students with exceptional needs
ICT Information and Communication Technology
IEP Individual Education Plan
IMC Instructional Materials Centre
IMR Infrastructure Maintenance and Renewal (formerly BQRP & IMP)
IPDP Individual Professional Development Plan
IPP Individualized Program Plan
IRC Information Reporting Committee
IS Information Services
IT Information Technology
K&E Knowledge & Employability
LAB Local Authorities Board
LAC Local Advisory Committee
LAPP Local Authorities Pension Plan

LC Learning Commons
LICO Low Income Cut Off
LRC Learning Resources Centre
LRCA Learning Resources Credit Allocation
MSP Medical Support Plan
NRLC Northwest Regional Learning Consortium
NSBA National School Boards Association
ODD Oppositional Defiant Disorder
OH&S Occupational Health and Safety
OT Occupational Therapist
P3 Public Private Partnership
PAC Parent Advisory Council
PAR Program Accounting & Reporting
PASI Provincial Approach to Student Information
PAT Provincial Achievement Test
PD Professional Development
PDAC Professional Development Area Conference
PEP Pre-Employment Program
PIPA Personal Information Protection Act
PLC Professional Learning Community
POARA Professional and Occupational Association Registration Act
POM Plant Operations & Maintenance
PRSD Peace River School Division
PSAB Public Sector Accounting Board
PSBAA Public School Boards' Association of Alberta
PTR Pupil Teacher Ratio
PUF Program Unit Funding
PUFS Program Unit Funding System
RAP Registered Apprenticeship Program
RCF Regional Consortium Funding
RCO Review Committee on Outcomes
RCPA Relative Cost of Purchasing Goods & Services Adjustment
RECS Regional Educational Consulting Services
SACS Safe and Caring Schools
SAFRS School Authorities Funding & Revenue System
SBDM Site Based Decision Making
SCSI Small Class Size Initiative
SSW School Social Worker
SEP School Education Plan
SES Socio-Economic Status
SF School Finance
SGF School Generated Funds
SHI Student Health Initiative
SIPP Supplemental Integrated Pension Plan

SIS Student Information System
SLP Speech Language Pathologist
SP Special Programs
SPOSA School Plant Officials of Alberta
SS Support Services
SSBN Small Schools by Necessity
SSLC Support Staff Liaison Committee
SSLM Support Staff Labour Management
STAA Student Transportation Association of Alberta
STAC Superintendent Teacher Advisory Committee
STB Stakeholder Technology Branch (Alberta Education)
STEP Summer Temporary Employment Program
STR Student Teacher Ratio
TBAC Teacher Board Advisory Committee
TEBA Teachers/ Employer Bargaining Association
TEC Teacher Efficacy Committee
TLC Transportation Liaison Committee
TPA Teaching Profession Act
TQS Teacher Qualification Service
TSQB Teacher Salary Qualification Board
UNA Unrestricted Net Assets
WCEAC Western Canadian Educational Administrators' Conference
ZS Zone Services