



Office of the  
Saskatchewan Information  
and Privacy Commissioner

OTHER POLICY

## **3.0 OTHER**

### **3.04 ELECTRONIC FILE NAMING**

#### **Purpose**

To establish policy and procedure for determining the correct name for an electronic file.

#### **Application**

This policy applies to the staff of the IPC and anyone using IPC resources.

#### **Background**

In order to effectively manage electronic files, a standard naming convention used consistently across the IPC is required.

A standard naming convention helps to create understandable, consistent and predictable names for electronic files and will:

- facilitate better access to and retrieval of electronic files;
- facilitate the eventual disposition of electronic files;
- allow sorting of files in a logical sequence; and
- enhance the ability to recognize the content of a file.

#### **Policy**

An electronic file name should include some or all of the following elements:

- Date
- Description
- Version Number

The sequence of the elements will vary depending on the document being named. Each element should be separated by an underscore (\_).

Element	Example	Explanation
<b>Date</b>	2014-07-15	<ul style="list-style-type: none"> <li>- Use the ISO format YYYY-MM-DD (four digit years, two digit months and two digit days).</li> <li>- Stating the dates 'back to front' maintains the chronological order of the records.</li> <li>- Use the most helpful date for retrieval purposes. It might simply be the fiscal year, such as in Annual Reports.</li> <li>- For string emails, the time (HH:MM) should also be included.</li> </ul>
<b>Description</b>	Analysis to SGI	<ul style="list-style-type: none"> <li>- Use words that clearly describe the content of the document.</li> <li>- Keep the description short but meaningful – no more than 10 words.</li> <li>- Avoid using words like 'and', 'or', 'a', 'the' etc. as they add length but not meaning to a file name.</li> <li>- Think of the user/recipient and how they might search for and retrieve the document.</li> <li>- Documents going to or coming from an applicant/complainant are to be saved using the words 'applicant' or 'complainant'.</li> <li>- Documents going to or coming from a public body are to be saved in the name of the public body, not the individual person at that public body.</li> <li>- Frequently used public bodies will be consistent and abbreviations will be used. <b>See Appendix A for a list of abbreviations.</b></li> </ul>
<b>Version</b>	v.01	<ul style="list-style-type: none"> <li>- When multiple drafts or versions of a file are created, the notations 'v.#' or 'final' will be added to the file name.</li> <li>- Numbers 0-9 should always be written as two-digit numbers (01, 02, 03 etc.) to ensure they are stored in numerical order.</li> </ul>

The file name in the above example would be written as follows:

2014-07-15\_Analysis to SGI\_v.01

If the file in the above example was the final version, it would be written as follows:

2014-07-15\_Analysis to SGI\_final

### **Correspondence Records (including emails)**

File names of correspondence should include the following elements:

- Date of letter or email (and time HH:MM for string emails);
- Name of correspondent (i.e. the name of the applicant/complainant or public body who sent the letter/email/document or to whom you sent the letter/email/document);
- Subject description – no more than 10 words; and
- Case file number (if applicable) \*note: case file numbers include a dash (-) not a slash (/)

Examples:

2014-07-25\_Notification Email to Applicant\_054-2014

2014-08-10\_Submission from SGI\_013-2014

2014-08-20\_Email from SaskTel\_105-2013

2014-07-28\_NTF-phone conversation with Complainant\_123-2012

When saving emails, rename messages according to the above and delete prefixes (i.e. RE, FW).

Please make certain emails are sent before they are saved to the appropriate folder.

### **Email Attachments**

Email attachments should be opened and saved separately. This will facilitate better access to and retrieval of the attachments and will also assist in the conversion of these documents to PDF/A (an ISO-standardized version of PDF for the long term digital preservation of electronic records).

File names of email attachments should begin with the name of the email it was attached to and end with the phrase 'attch xx' plus a brief description of the attachment.

Examples:

2014-08-20\_Email from SaskTel\_105-2013

2014-08-20\_Email from SaskTel\_105-2013\_attch 01 submission

2014-08-20\_Email from SaskTel\_105-2013\_attch 02 record

Naming attachments this way ensures they remain in order with their corresponding email in the electronic folder.

### **Things to Keep in Mind**

File names should be meaningful to anyone who needs to access them. Consideration should be given to the record's intended audience, searching requirements and how the record may be identified when retrieved on its own without the folder or if it ever becomes relocated or detached from the folder.

The elements to be included in a file name should be ordered according to the way in which the record will be retrieved. For example, if the records are retrieved according to their date (e.g.

meeting minutes) the date element should appear first. If the records are retrieved according to their description (e.g. publication) the description element should appear first.

Example 1:

2014-07-21_Agenda	rather than	Agenda_2014-07-21
2014-07-21_Minutes		Agenda_2014-08-25
2014-08-25_Agenda		Minutes_2014-07-21
2014-08-25_Minutes		Minutes_2014-08-25

Example 2:

Access Newsletter_v.01_2014-07-15	rather than	2014-07-15_Access Newsletter_v.01
Access Newsletter_v.02_2014-07-20		2014-07-18_Privacy Brochure_v.01
Privacy Brochure_v.01_2014-07-18		2014-07-20_Access Newsletter_v.02
Privacy Brochure_v.02_2014-07-28		2014-07-25_Privacy Brochure_v.02

**Authority**

*The Freedom of Information and Protection of Privacy Act, section 43.1*