Guideline
Digital Record Naming Convention

This guideline falls under *A1477 Data and Information Management Administrative Policy.*

Program Impacted	Project and Asset Management *The City of Edmonton's projects are well managed and assets are maintained for accountable service delivery.* Technology and Data *The City of Edmonton's technology and data are leveraged to enable quality decision-making and enhance innovative service delivery.*
Approved By	Aileen Giesbrecht, City Clerk
Date of Approval	March 18, 2025
Approval History	N/A
Next Scheduled Review	March 2027

Guideline Statement

This guideline provides direction to facilitate consistent identification and retrieval of digital records across the corporation, enabling the City of Edmonton to comply with legislated records management requirements.

Scope

This guideline provides direction to all City of Edmonton business areas that obtain, create or manage City records in digital formats. Accountability is laid out in the Corporate Records and Information Management Accountability Model as a Responsible, Accountable, Supportive, Consulted, Informed (RASCI) chart.

This guideline falls under the Lifecycle Management (LM) functional domain, as defined in *A1477 Data and Information Management Administrative Policy.*

Guideline Description

This guideline provides record naming and version control direction for non-transitory records in unstructured digital environments.

Definitions

The following definitions may also be found in the *Corporate Information Management Glossary of Terms*.

Acronym refers to an abbreviation formed by the initial letters of a series of words.

City record refers to recorded information in any form in the City of Edmonton's custody or control, including data and information acquired or developed during the course of City business.

Defensible disposal refers to an approved, repeatable, documented standard process to manage the lifecycle of City records based on the length of time that categories of records are maintained and how they are destroyed.

Digital record refers to City information that is entered, created, manipulated and/or stored on digital media or storage devices. This includes:
- records that are born digital (that is, records that are created and saved digitally, like online forms or digital photos)
- digitized records (for example, records that have been converted from a non-digital format, such as scanned paper records)
- unstructured data (for example, Google documents)
- structured data maintained within digital systems (for example, tables within a database)

Metadata means "data about data." Metadata documents the context, content and structure of information and supports the effective management of the City's information holdings.

Naming convention refers to the rules outlining how to name records in a standardized, intuitive and searchable way that identifies the contents of the record and its relationship to other records.

Non-transitory records demonstrate the City's activities, business transactions and decisions. There are many different types of non-transitory records, each with specific rules about how long they need to be kept (retention period) and whether to destroy them or transfer them to archives (disposition). These rules are outlined in the City of Edmonton Classification and Retention Schedule.

Transitory records refer to City records and information that may be required for a limited period of time for the completion of a routine action or the preparation of a corporate record, but not required to meet statutory obligation or to sustain administrative or operational functions. Transitory records only possess an immediate value and should be disposed of thereafter.

Unstructured records refer to information that does not reside in fixed fields of a database. Unstructured records are created using common desktop applications, such as Google or Microsoft applications, to support ongoing business activity.

Versioning refers to the process of assigning either unique version names and/or numbers to different stages in the maturation of a document.

Guideline Specification

Naming Requirements

Each business area will name records in one of the ways below:

- using the record naming principles laid out below; or
- using a documented, business area specific naming convention reviewed and recorded by the Corporate Records and Information Management team within the Office of the City Clerk.

Record names must communicate the following elements:

- subject
- document type
- date that an official document is submitted or finalized, using format YYYYMMDD

These elements may be arranged in whatever format makes sense for the business area or which element is considered most relevant for locating and understanding what the record is.

When naming records, use special characters, abbreviations, acronyms or people's names only if they are part of an official vendor, customer, project or committee name.

Table 1: Examples of Effective File Names

Subject	Document Type	Date	Resulting File Name
Bylaw Scanning	Procedure	2022	Bylaw Scanning Procedure 2022
City Operations	Fleet Inventory	January 14, 2018	City Operations Fleet Inventory 20180114
Paper Reduction Project	Project Charter	April 1, 2017	Paper Reduction Project Charter 20170401
Affordable Housing Project	Strategy	2023-2006	Affordable Housing Strategy 2023 to 2006

Each business area will name records in a way that includes the following

- defines record content clearly
- uses intuitive naming
- uses full words

- spells out abbreviations and acronyms, where possible
- demonstrates subject, document type and date

Business areas will not name records in a way that:
- uses vague or unclear names
- includes punctuation or special characters
- includes emojis
- contains personal information in the file name, unless absolutely necessary
- uses acronyms or abbreviations that are not widely recognized
- adds leading zeros or letters (i.e., beginning a file name with a 0 or a letter that is not part of the record name. For example, *012345678 001 Building Permit* is a record name with a leading 0. *B20240125 Employee File Plan* is a record name with a leading letter.)

Record Versioning

Business areas should not create additional copies or versions of any Google Docs, Sheets, Slides and Sites for anything other than temporary purposes. Originals that have been officially approved or submitted should have access changed to "view only" and must be saved without alteration as a permanent record.

Multiple versions of a document can make it difficult for employees to locate the current version. Instead, use Google's version history functionality for any living document.

Exceptions

Business areas may request naming convention exceptions. The Corporate Records and Information Management team within the Office of the City Clerk will review exception requests, provide feedback where necessary and list exceptions on Corporate Records and Information Management's OneCity page. Naming convention exceptions that contain sensitive information will not be listed.

Compliance

Records management compliance is the responsibility of the business area, overseen by the Branch Manager as per the Corporate Records and Information Management Accountability Model (RASCI). Non-compliance may result in the following damage to the corporation:
- increased time and cost required to recreate lost records
- increased legal risk, as not providing lost records requested as evidence may be seen as obstruction, resulting in fines and/or increased legal costs
- Inability to comply with the requirements of provincial protection of privacy and access to information legislation.

References and Supporting Documents

Legislation

- *Municipal Government Act, RSA 2000, c M-26*

Supporting Documents

- City of Edmonton Classification and Retention Schedule
- Corporate Information Management Glossary of Terms
- Corporate Records and Information Management Accountability Model (RASCI)
- Digital Record Naming Principles