

Naming Conventions

Purpose & Recommendation:

A file name is the chief identifier for an electronic record; 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.

The committee is recommending that jurisdictions adopt common naming conventions for student records to improve consistency and maintain a logical and predictable system of document names to better facilitate their storage and retrieval, even as students transfer between jurisdictions.

Suggested Format:

ASN#_LastName_FirstName_RecordType_AdditionalInformation

- Use the student's Alberta Student number as an identifier in the file name.
- Names: Write the name of the student, if required, using surname, separating last and first name using an underscore.
- Dates: When a date is necessary use the order of year, month and day, e.g. YYYYMMDD.
- If using acronyms or abbreviations, follow the format as listed on the PASI-identified [Student Document Type](#).
- Avoid the use of symbols, e.g. ~ " # % & * : < > ? / \ { | }. Hyphens and underscores are permitted.
- Do not use words that are excluded from searches, e.g. the, if, but, so, for, etc.

PASI Requirements

Uploading documents to PASI requires metadata to be added at the time of upload, either via manual entry or using information listed on a waybill. Metadata helps to identify records and aid in their retrieval.

Examples:

Following format:

ASN#_LastName_FirstName_DocumentType_AdditionalInformation

3025145210_Smith_Josie_BirthCert

- Metadata would include information such as
 - Category - Identity
 - Document Name - Alberta Birth Certificate
 - Document Date

3025145210_Smith_Josie_RegForm_Gr1-3_Historical

- Metadata would include information such as
 - Category - Admin
 - Document Name - Historical Student Documentation

3025145210_Smith_Josie_IPP

- Metadata would include information such as
 - Category - Individual Program Plans
 - Document Name - IPP
 - School Year
 - Document Date

3025145210_Smith_Josie_ELLSummaryReport

- Metadata would include information such as
 - Category - Second Language
 - Document Name - ELL Summary Report
 - School Year
 - Document Date

3025145210_Smith_Josie_RepCard

- Metadata would include information such as
 - Category - School Reports
 - Document Name - Progress Report / Report Card
 - School Year
 - Document Date