**Naming Electronic Documents**

# Purpose

**1.1** Electronic documents named consistently can be located more easily and grouped based on project/ subject and version, avoiding errors, accidental deletion, unnecessary duplication or mismanagement of our organization’s important information. It will also allow for effective transfer or disposal of files when applicable.

# Scope

**2.1** This guideline applies to employees of the Office of the Ombudsman for the Department of National Defence and the Canadian Forces.

# Contacts

**3.1** Records and Information Management Administrator

**3.2** Manager, Business Planning and Administration

# Roles and Responsibilities

**4.1** All employees at the Office of the Ombudsman for the Department of National Defence and the Canadian Forces have the responsibility to follow the naming convention.

**4.2** It is the responsibility of the Information Management Officer (IMO) to ensure that a naming convention is implemented throughout the organization. The naming convention must be documented and audits of files will be performed to ensure standards are being followed.

# Operating Procedures/ Principles

## 5.1 General Guidelines

* The folder names usually define the folder contents. For example, the “Operations” folder would indicate that all items contained within that folder are related to Operations. Documents and folders in that folder do not need to have the word “Operations” in their file names.
* Use an English file name for English versions and a French file name for French versions.
* Store the French version under the English folder name.
* Use underscores instead of spaces (helps with links and hyperlinks)
* Try to limit document names to no more than 100 characters.

**5.2 Corporate Repository - Shared Drive**

##### 5.2.1 Draft documents:

**Format:** TITLE\_VERSION

**Example:** File\_Naming\_Convention\_V09.doc

* Use version numbers but no dates.

##### 5.2.2 Final versions:

**Format:** TITLE\_DATE

**Example:** Email\_Transformation\_2014-09-13.doc

* Use the final date but no version number. The final date will aid in the transfer or disposal of the file when applicable.

## 5.3 Operations Case Attachments

## Naming Convention - Case File Repository - CCM Mercury

**5.3.1** **Operations Case Attachments**

##### Closure Form and Letter

CLOSURE FORM (v0)

CLOSURE LETTER (v0)

* Once the final version of a document has been approved - please delete the drafts.

##### Intake Summary and Consent Form

OCF W14XX000000 date

INTAKE SUMMARY (date if required)

CONSENT FORM

##### Emails and Correspondence

EMAIL - to/from - SUBJECT - DATE\*

FAX - SUBJECT - DATE

LETTER - SUBJECT - DATE

TAB (number or letter) - SUBJECT - DATE

* If you’re referencing TABs in your closure form, please use this as a header in CCM.

##### Case Log and Record of Contact

CASE LOG

ROC - LAST NAME OF CONTACT - DATE

##### 5.3.2 Policies and References

* DAOD\_TITLE
* CFAO\_TITLE
* CANFORGEN\_TITLE
* QR&O\_TITLE

### 5.3.3 Systemic Attachments

* BACKROUND\_INFORMATION
* INVESTIGATION\_PLAN
* METRICS
* TIMELINE
* EVIDENCE\_COLLECTION\_PLAN
* INTERVIEW\_PLAN

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# Glossary of Terms

|  |  |
| --- | --- |
| **DAOD** | Defence Administrative Orders and Directives |
| **CANFORGEN** | Canadian Forces General Order |
| **CFAO** | Canadian Forces Administrative Orders |
| **OCF** | On-line Complaint form |
| **QR&O** | Queen's Regulations and Orders |
| **ROC** | Record of Contact |