



## RECORD TITLING

Have you titled your records appropriately? Could someone unfamiliar with your business identify the nature of your record content based on the title alone?

One of the most important functions of any records management system is ensuring that records can be located at a later date. A title that provides a concise statement of the content of the record will ensure that the right record will be found efficiently and its content and context understood.

If the title does not reflect the content of the file, or the individual document, it will be difficult for users to find the information they need. **\*\*Effective titles distinguish one record from all others.**

When creating a title for a record consider the following:

- **Be precise yet inclusive** – Titles should be specific. If the title is too general, unrelated material will be placed on the file, making it harder to find and retrieve the document you need.
- **Be consistent** – Titling files on similar business consistently makes them easier to find. Use agreed terms in situations where there can be variations, for example consistently use 'personnel' – not 'staff' or 'employees'.
- **Avoid jargon and abbreviations** – Jargon tends to change over time making it difficult to find records when usage is no longer current. Acronyms and abbreviations can mean different things to different people at different times. If an abbreviation needs to be used, it is best to write the name out in full and then place the abbreviation in brackets e.g. Records Governance Services (RGS).

## DOCUMENT TITLES

The name or title of a document should describe its purpose or "business" and distinguish the document from all others. Record titles should contain sufficient information and be meaningful enough to explain their content without the user having to physically open the record.

Please consider the following when titling your documents:

- Free text is used for the titling of documents in TRIM. This means the future retrieval of documents is largely dependent on how well you title your records.
- When adding emails into TRIM, the subject line of the email will automatically populate the title field. This title should be reviewed and updated to ensure an appropriate title is created. Titling format for emails is [Sender] to [Recipient] – [Subject] – [Date – if necessary]. In addition, ensure you remove "RE:" and "FW:" from the start of your document titles.
- If records on similar issues are titled consistently, it makes them easier to retrieve. Make sure that you use an agreed term in situations where there can be variations (e.g. use 'personnel' – not 'staff' or 'employees' and use 'student' instead of 'pupil'). It's a great idea to establish local business rules for business units.

## GENERAL PRINCIPLES

### Hyphens

Apply hyphens with adjacent spaces to separate titles into logical 'parts' and aid readability:

- Minutes – Records Governance Services Team Meeting – 21 April 2021
- Feedback – Information Management Strategy – Records Governance Services

### Metadata

Ensure the title isn't too wordy as it can become cluttered.

- **Before:** Email of 7 September 2016 from Joe Bloggs to Jane Doe regarding the removal of workforce office furniture from Building A to Building B
- **After:** Bloggs to Doe – Removal of Office Furniture – Building A to B – Workforce Department

## Uppercase

Using UPPERCASE can make reading titles difficult. Use uppercase only when appropriate. Capitalisation may be used freely.

## Dates

Dates are often not required in titles as the TRIM metadata captures this information automatically e.g. 'date created'. However, dates should be captured when they are vital for the record, for example, with meeting minutes/agendas, travel/conference records, contracts/agreements. The following formats for placing dates in titles should be followed:

- **Monthly Meetings:** September 2021, April 2022
- **Occasional Meetings:** 15 September 2021, 15 April 2022
- **Contracts/Agreements:** 1 July 2021 to 30 June 2022, 1 January 2020 to 31 December 2020
- **Financial Year:** 2020/21, 2021/22, 2022/23
- **Strategies/Plans:** 2012-2022, 2017-2021

## Abbreviations and Acronyms

Try to avoid using acronyms and abbreviations as they can mean different things to different people. If you do need to use an abbreviation place them in brackets after spelling the abbreviation out in full, for example:

- Records Governance Services (RGS)
- Digital Technology Solutions (DTS)

**NOTE:** Common place abbreviations such as NSW and UON are acceptable. Local Business Rules for your area should be developed to contain other acceptable abbreviations.

## Symbols

Try to avoid using symbols in place of words as it can hinder searchability. This includes common place symbols such as ampersand ('&' – standing for 'and'). Symbols should always be spelt out in full.

## Shortening Words

Shortening words can hinder the ability to search on and retrieve records in the future e.g. Mtng (Meeting), Re (Regarding), Org (Organisation).

## **LINK TO KNOWLEDGE GUIDES**

Please refer to the following link for further information on 'Naming Conventions' for student records:

<https://www.newcastle.edu.au/trim/excel-document?docid=D15/61944>

A list of currently approved acronyms can be found here:

<https://www.newcastle.edu.au/trim/excel-document?docid=D15/258727>

## EXAMPLE OF NAMING CONVENTIONS FOR COMMON DOCUMENTS

Record	Title Structure	Examples
<b>Agendas and minutes</b>	Agenda/Minutes – [Meeting Name] – [Area/Location] – [Date]	Agenda – Records Governance Services – March 2016 Minutes – Faculty Progress and Appeals Committee Meeting – April 2017
<b>Agenda items</b>	Item [Item number] – [Name of agenda item] – [Meeting Name]	Item 1.1 – Draft Recordkeeping Policy – Policy and Procedures Committee Item 1.2 – Review Terms of Reference – Work Health & Safety Committee
<b>Briefs</b>	Brief – [Title of Brief] – [Area/Location]	Brief – Evaluation of HP Records Manager (HPRM) – Office of the Chancellor Brief – Refurbishment of Hunter Building – Callaghan Campus
<b>Business cases</b>	Business Case – [Title of business case] – [Area/Location]	Business Case – SharePoint TRIM Integration – Resources Division Business Case – John Smith Records Forum Attendance March 2017 – Records Governance Services
<b>Complaints</b>	Complaint – [Complainant] – [Subject of Complaint] – [Area/Location] – [Date – if required]	Complaint – John Smith – Car Parking Availability – Callaghan Campus Complaint – Lisa Jane – Error in unofficial transcript – School of Engineering
<b>Contracts/Agreements</b>	Contract/Agreement – [Name of Contract] – [External Parties to Agreement] – [Date]	Contract – Credit Transfer Arrangement – University of New England – 1 September 2016 to 31 August 2019 Fully Executed Agreement – Lease of Printer MF546 – Fuji Xerox Australia Pty Ltd – 1 November 2016 to 31 October 2017
<b>Letters</b>	Letter – [Subject] – [Area/Location] – [Date – if necessary]	Letter – John Smith Offer of Employment – Administration Officer Resources Division – 3 June 2016 Letter – Feedback for Records Management Policy – NSW State Archives and Records
<b>Emails</b>	[Sender Surname] to [Recipient Surname] – [Subject] – [Date – if necessary]	Kennedy to McElhinney – Update on TRIM Implementation Project – March 2017 Brown to Smith – Outstanding Tasks – Graduation Ceremony – April 2017
<b>Reports</b>	Report – [Name of Report] – [Location]	Report – TRIM Usage – Student Central – 2016 Human Resources Support to Records Governance Services – Cessations List – April 2017