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 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**Avoid jargon and abbreviations** – Jargon tends to change over time making it difficult to find records when usage is no longer current.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 it 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 in to logical 'parts' and aid readability:

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

Metadata

Information that is captured in the records metadata (e.g. information you populate when you fill out the new record form in TRIM), doesn't need to be included in the title e.g. author, record number, version, related record.

Short and Sharp

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

> **Before:** Email of 7 September 2016 from Joe Bloggs to Jane Doe reagrding the removal of workforce office furniture from Building A ro 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).

Examples of Naming Conventions for Common Documents

Record	Title Structure	Examples
Agenda and Minutes	Agenda/Minutes – [Meeting Name] - [Area/Location] – [Date]	Agenda – Records Governance Services – March 2016 Minutes – Faculty Progress and Appeals Committee Meeting – April 2017
Agenda Items	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
Briefs	Brief – [Title of Brief] – [Area/Location]	Brief – Evaluation of Content Manager (CM) – Office of the Chancellor Brief – Refurbishment of Hunter Building – Callaghan Campus
Business Cases	Business Case – [Title of Business Case] – [Area/Location]	Business Case – SharePoint TRIM Integration – Resources Division Business Case – John Smith Records Forum Attendance – Records Governance Services – March 2017

Complaints	Complaint – [Complainant] – [Subject of Complaint] – [Area/Locatio] – [Date – if required]	Complaint – John Smith – Car Parking Availability – Callaghan Campus Complaint – Lisa Jane – Error in Unofficial Transcript – School of Engineering
Contracts/Agreements	Contract/Agreement – [Name of Contract] – [Date]	Contract – Kintaiba Community Child Care Centre – 1 September 2016 to 31 August 2017 Agreement – Lease of Printer MF546 Fuji Xerox – 1 November 2016 to 31 October 2017
Letters	Letter – [Subject] – [Area/Location] – [Date – if necessary]	Letter – John Smith Offer of Employment – Administration Officer Resources Division – 3 June 2020 Letter – Feedback for Records Management Policy – NSW Archives and State Records
Emails	[Sender] to [Recipient] – [Subject] – [Date – if necessary]	Kennedy to McElhinney – Update on Trim Implementation Project – March 2020 Brown to Smith – Outstanding Tasks – Graduation Ceremony – April 2020
Reports	Report – [Name of Report] – [Location]	Report – TRIM Usage – Student Central – 2020 Report – Financial Expenditure – School of Psychology – 2019/20

Link to Knowledge Guides

- Please refer to the attached link for further information on 'Naming Conventions' for Student Records [Naming Convention for TRIM – Student Records](#)
- A list of currently approved acronyms can be found [here](#)