

# Naming and Titling Conventions Guideline

## Section 1 - Titling Documents

- (1) One of the most important functions of records management is to be able to locate business records in the future. A title should provide a concise statement of the content of the business record.
- (2) A meaningful title supports better recordkeeping, reduces duplication and allows ACU business records to be located by staff that require access to it, when they need it. This helps aid discovery and search processes. A key titling benchmark is that titles should distinguish the business record from all others.
- (3) All staff and contractors are required to create and maintain full and accurate records of their business activities as detailed in the [Records and Archive Management Policy](#). Staff should understand and use the principles in this guide when creating and naming business records.

## Section 2 - Principles

- (4) The following principles apply to the naming of files, folders, and containers:
- a. capture the purpose of the document;
  - b. be brief and clearly explain the context and meaning of the content;
  - c. be specific; use a short phrase or names (e.g. of an organisation, individual or project) to define the action, subject or topic of the document;
  - d. be consistent:
    - i. use the date format YYYY-MM-DD;
    - ii. the document status such as drafts or versions can be managed by the metadata properties of the document;
    - iii. for documents that are produced regularly (i.e. meeting minutes) insert the date first in the title to enable easier search and retrieval processes; and
    - iv. always use the full name of an organisation.
  - e. be aware of the following naming and titling issues:
    - i. avoid superfluous words like 'the' and 'a' which do not add any value to searches;
    - ii. avoid abbreviations and acronyms;
    - iii. avoid using ambiguous titles (e.g. 'Final Report'), with no further details included;
    - iv. avoid using punctuation (this can impact search results);
    - v. dashes can be used to separate words but must always include a space before and after (e.g. 2017 - 05 - 19 Audit Risk Committee Agenda;
  - f. avoid using jargon which may be understood by some but not all; and
  - g. avoid titles with imprecise nomenclature (e.g. doc, doc1, doc123).

Note: The Business Classification System in Content Manager (TRIM) links the functions and business activities of the University to the business records that are created by staff.

## Section 3 - Examples of Recommended Conventions

Best Practice Naming Conventions	Naming Conventions to be avoided
2017 - 05 - 19 Audit Risk Committee Agenda	Agenda for the Audit and Risk Committee to be held on 19 May 2017
2017 - 05 - 19 Audit Risk Committee Minutes	A&R Cmtee Minutes 19 May
Information Governance Policy v1	Policy Info Gov v1
Strathfield Carpark Construction Project Plan Final	Final plan Strathfield carpark
Faculty of Law and Business Student Recruitment Strategy	FLB Recruitment Strategy
Leasing Agreement Xerox Multi-Purpose Devices 2017 - 05 - 19	Xerox Agreement
Annual Leave Application Terry Crews 2017 - 06 - 26 to 2017 - 07 - 21	TC A/L
2017 - 05 - 19 Government Records Repository Invoice	Invoice GRR
Guideline Naming Conventions v1	Guideline - Document & File Naming Convention Guide - v1
2019 - 2020 ACU Budget Approved	Budget 19/20
Media Release VC Higher Education Federal Budget Implications 2020 - 05 - 19	Release 20200519
Request for further information - Document Disposal Query - Governance 2020 - 05 - 19	RE: Document Disposal

## Section 4 - Guidelines for Naming Common Types of Documents

Document Type	Document Naming / Title
Agenda	Agenda [Name of Committee] - Date of Meeting YYYY - MM - DD Agenda Records Management Steering Committee 2020 - 10 - 30
Copyright Licences	Copyright Licence - [Other Party] - [Subject] - Date Signed/Draft Date YYYY - MM - DD Copyright Licence - APRA - Download ACU Website for inclusion in University Newsletter - 2020 - 10 - 30
Email from / sent to Faculty / School / Division	Email from [Sender] to [Recipient] - Subject - Email Date YYYY - MM - DD Email from University Records Manager to Academic Secretariat - Authority to Destroy Records - 2020 - 10 - 30
Fax from / sent to Faculty / School / Division	Fax from [Sender] to [Recipient] - [Subject] - Date of Fax YYYY - MM - DD Fax from Bob Brown University Canberra to Academic Secretariat - Request for information regarding management structure of Faculties and Schools 2020 - 10 - 30
File / Meeting notes	File Note - [Telephone Call from/to Meeting with....] - [Subject] - [Author] - Date of note YYYY - MM - DD File Note - Telephone call to University Records Manager Training for Academic Secretariat Staff - John Jones - 2020 - 10 - 30

Document Type	Document Naming / Title
Forms	[Name of Form] - [First Names Surname of person signing form] - Date form was signed YYYY - MM - DD Date of Material Interest - Mary Jones - 2020 - 10 - 30
Leasing Agreements	[Leasing Agreement] - [Other Party] - [Date signed/Draft date YYYY - MM - DD] Leasing Agreement - Xerox - Multi Purpose Devices - 2020 - 10 - 30
Letter form / sent to Faculty / School / Division	Letter from [Sender] to [Recipient] - [Subject] - [Date of Letter YYYY MM - DD] Letter form Bob Smith University Canberra to Academic Secretariat - Request for academic Secretariat to present at conference on 04 - 05 - 2020 - Dated 2020 - 10 - 30
Memorandum of Understanding (MOU)	Memorandum of Understanding MOU - [Other Party] - [Subject] - Date on Letter YYYY - MM - DD Memorandum of understanding MOU - Bathurst High School - Student Placement - 2020 - 10 - 30
Minutes	Minutes [Committee Name] - Date of Meeting YYYY - MM - DD Minutes Records Management Steering Committee - 2020 - 10 - 30
Offer of Employment	Offer of Employment - [Position] - [Commencement Date DD-MM- YYYY] - Date of Letter YYYY - MM - DD Offer of Employment - University Records Manager - 17 - 10 - 2020 - Brian Jones 2020 - 10 - 30
Offer of Secondment	Offer of Secondment - [Position] - [Commencement date DD - MM - YYYY] - First Name Surname Employee Number - Date of Letter YYYY - MM - DD Offer of Secondment - Lecturer - 01 - 10 - 2020 - John Smith 12 - 25 - 45 - 2020 - 10 - 30

## Section 5 - Review

(5) Unless otherwise indicated, this Guideline will still apply beyond the review date.

## Status and Details

<b>Status</b>	Current
<b>Effective Date</b>	1st April 2024
<b>Review Date</b>	29th April 2024
<b>Approval Authority</b>	Director, Governance
<b>Approval Date</b>	1st April 2024
<b>Expiry Date</b>	Not Applicable
<b>Responsible Executive</b>	Diane Barker Director, Legal, Assurance and Governance
<b>Responsible Manager</b>	Warwick Elvin Senior Project Manager (Records & Information Management)
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