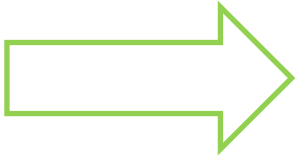


 MANAGING FORBIDDEN TERMS, RULES AND METADATA FOR RECORD TITLES ENSURE THAT WE WILL BE ABLE TO FIND OUR RECORDS AND DOCUMENTS WHEN THEY ARE NEEDED.



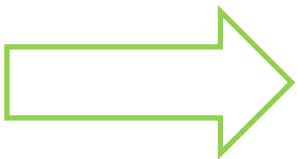
Forbidden Terms — Do Not Use in any Title

- Email
- Document
- Memo
- Letter
- Correspondence
- Report
- Spreadsheet

Calling something letter, document or correspondence will not help in any way to find a document.

Remember it may not be you that is trying to find this document, the document may need to be located by other staff years after you created or received it.

Use meaningful document titles, do not use rambling sentences. Remember the context of the document is clearly contained in the folder/file/container titles and this means that you do not need to add the context to the document title.



Consider how names can be shown in a document title

The rule is Surname followed by First Name and then second and subsequent names where used, for example:

Johnson David
Joyce Shane Paul
Smith Rosemary
Taber Mark Timothy



Rules for how to use acronyms in either documents or folder/ file/container titles

Organisation and other titles frequently change and so do the associated acronyms. Unfortunately, unless you use the correct acronym in a folder or possibly a document title you will be unable to find any folders or documents containing that acronym.

In addition, you will need to know what the organisation was called previously so that you may search broadly for folders or documents with earlier iterations of an organisation's name or acronym.

The rule is, record the full title and the acronym in the document/file title. If it is in the file title then there will be no need to reuse it in the document title.

Example - Australian Computer Association ACA

When adding documents to folders/files/containers which already contain an acronym NEVER repeat the full title or acronym in the document title.



Metadata

- Do not repeat any metadata fields used on your Document Entry screen into your document title. Examples as listed below...
 - Name of sender or addressee
 - Document date
 - An Outlook Email Message, MS Word Document, MS Excel, PDF, etc.
 - File Name or number
- Do Not repeat terms contained in the File title in the Document title.
- Consider that all documents should be attached a file/folder and the file or folder title provides the context for the document, and therefore there is no need to repeat terms in both the file and document title.

