

## WHITTLESEA CITY COUNCIL

### RECORDS AND DOCUMENT MANAGEMENT BUSINESS RULE NO 1

<b>CATEGORY:</b>	Staff
<b>SUBJECT:</b>	Electronic Document Naming Conventions
<b>PURPOSE:</b>	This guideline sets out protocols for the naming of electronic documents. Primarily this guide is for use with the Electronic Document Management (EDM) system. However staff are encourage to adopt these protocols for any document stored on the Councils electronic file structure.
<b>DIRECTORATE RESPONSIBILITY:</b>	Civic Administration/Corporate Services

### **INTRODUCTION**

In today's environment electronic information makes up a significant portion of the information holdings of the Council. The number of electronic documents created, transmitted and received continues to increase at a rapid rate. Electronic records are a valuable corporate resource for the Council and enables the Council to meet accountability requirements and for staff to engage in effective decision making and policy development. These electronic records enable staff and Council to prove that actions have been taken, commitments entered into or obligations carried out.

### **GUIDELINES**

<b>Component</b>	<b>Description</b>
Status/Stage/Subject	Specifically describe the progress stage or status that the document represents, for example, Request Further Information, Infringement Appeal, Letter of Objection. Where documents do not relate to a council process briefly describe the subject, for example, Waste Management Policy, Head Lice Program, Growling Frog Golf Course Marketing Plan.
Who	Name the sender or recipient. Include as much of the name for identification. For individuals it <i>may</i> be enough to use SURNAME only. For organisations use the full name avoiding terms such as OF, PTY, LTD.
Identification Number	If the document relates to applications, permits, licences, include the relevant number. For example Planning Application numbers, Dog Tag numbers, B Double permit numbers. If it is important to link to existing hardcopy files you may include the hardcopy file reference here.
Date	If the date of the document is important include in the name. Although the EDM will record and display the date the document was captured this date may be different from the document date. The format for dates must be: yyyyymmdd.

Transmission method	If the method of document transmission is important then include in the name, for example, Email, Fax, Mail, Courier.
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Format	Description
Punctuation	DO NOT use any punctuation if possible. Punctuation affects the ability to search for documents at a later date.
Spaces	PLACE spaces between each word in your document title to facilitate easy searching and reading.
Be Concise	DON'T write an epic – keep it simple. Titles don't need to be grammatically correct. Use key words or phrases. It's often not necessary or useful to include words such as "if, but, of, the, for, because" or "and".  Keep the number of characters used at an average of 20. In most cases less than 10 is not enough, and more than 50 is too much.
Versions	For documents outside the EDM, indicate the version of your document using the following protocol: v1.0 where v indicates version, the number before the decimal place indicates the version number and the number after the decimal place indicates the draft number. For example, v0.1 would indicate the first draft of a document., v2.0 would indicate the second version, v3.4 would indicate the 4 <sup>th</sup> draft of version 3.
Abbreviations and Acronyms	Wherever possible avoid the use of abbreviations and acronyms.
Be Consistent	Whatever conventions you use for naming your documents it should be consistent across your personal work areas as well as any shared work areas.

**Examples of good document names are:**

Footpath Inspection Report Simonds Homes 2004-05-06 Fax

Head Lice Policy Department Human Services 2003

Infringement Appeal Anna Smith 3066045 2004-05-06

Infringement Appeal Neil Brown 6056054 2004-04-03 Email

Media Release Minister for Planning 2004-05-06

Notice to comply Neil Brown 2004-05-06

Request Further Information Coomes Consulting 708199 2004-05-06

VCAT Decision 708199