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Ministry of Labour and Citizens' Services

Information Access Operations
Office of the CIO • Province of BC
People • Collaboration • Innovation

Free Text Title Naming Guidelines for Folders and Documents

Entering a clear title with sufficient information into the Free Text Title field helps to ensure searches in TRIM locate and retrieve all relevant records. Use these guidelines when cataloguing documents or creating new folders.

1. Create unique, concise, meaningful titles that will aid in retrieval. Include document version # and date, if relevant. Follow your branch/ ministry document naming and formatting conventions.

2. Enter titles in sentence case (i.e., capitalize first word in the sentence and any proper nouns).

3. Avoid punctuation. *Exception:* apostrophes in names (e.g., O'Brien)

4. Use abbreviations and acronyms in addition to the full name. *Exception*: acronyms that are always used (e.g., TRIM or IBM). If the full name is lengthy, add it to the notes field.

5. Use a "space" between the text and text separators such as a hyphen (-) or a slash (/). This will allow users to search on the individual text without using a wild card (*) (e.g., Drawings / Work Package). *Exception:* hyphenated names (e.g., Conway-Brown).

6. Use a "*space*" to separate initials in names.

7. Enter numbers as digits unless spelled out as words in names.

8. Enter years in the "YYYY" format; enter fiscal years or a range of years using "*space hyphen space*" between the years (e.g., 2004 – 2005).

9. Wherever possible avoid including personal/sensitive information.

10. When creating folders, prevent title duplication by first searching TRIM to ensure that the title has not already been used.

> *Note: Free text titles for documents or emails can be modified even after the record entry form has been saved. Also, information entered into the document free text title field does not change the original document/ email title.*

EDRMS