

Guidelines for Naming Conventions and Version Control

Electronic Document and Records Management System (EDRMS) SharePoint2010

**The Moray Council
Records Management**

Version 2.3
November 2015

Introduction

The successful use of an Electronic Document and Records Management System (EDRMS) requires that information created and held within the system is recorded consistently. Much of the information required to successfully file, retrieve and manage documents will be entered into the document properties, this is called metadata.

The use of metadata, a classification scheme and file naming conventions will reduce the time taken searching for information, as well as ensure accuracy and consistency in filing and reduce duplication.

Documents will have a name, a title, a content type and metadata associated with them when they are created and saved into the system. All of these may affect the document's information management, e.g. workflows and retention.

This guidance is applicable for naming any file in any repository, i.e. shared drives, hardcopies, EDRMS etc

Principles

- Fields marked with an asterisk (*) are compulsory
- Metadata must be completed fully, accurately and consistently. Do not replicate metadata in multiple fields.

The screenshot shows a web-based form for entering document metadata. The form is titled 'Housing Template Properties - Server' and has a location bar showing a URL with a red asterisk indicating a required field. The form fields are organized as follows:

Title: A Letter HS 1st Contact Creditor	Process Name: Housing Support	Library Name: Housing Support	Person Title: Mr	Forename: Joe
Middle Name: Bob	Surname: Bloggs	House Name or No: 141	Street: Smith Road	Locality: New Elgin
Town: Elgin	County: Moray	Post Code: IV30 1AB	Sent/Received: 03/03/2015	Closure Date: 31/03/2015

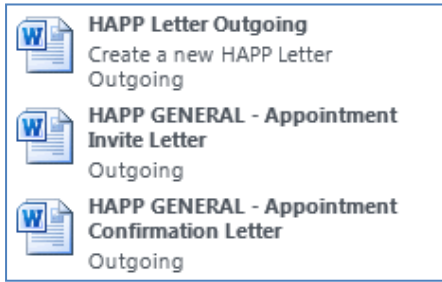
Below the form is a preview of a letterhead for 'ENVIRONMENTAL SERVICES' from 'The Moray Council'. The letterhead includes the council's logo and contact information:

ENVIRONMENTAL SERVICES
Housing and Property
The Moray Council
PO Box 6760
Elgin
IV30 9BX
Telephone: 0300 1234566
Email: housing@moray.gov.uk
Website: www.moray.gov.uk

Below the letterhead is a preview of a letter addressed to 'Mr Joe Bob Bloggs' at '141 Smith Road, New Elgin, Elgin, Moray, IV30 1AB'.

- The title field is a priority field when a search is performed, so use words that are likely to be searched for.
- When the document is saved the 'Name' field must be completed, this is also used within the URL; therefore it is important that it is meaningful without being too long:
<http://sp2010.moray.gov.uk/HouProv/HouProvTempLib/ALetterHS1stContactCreditor>
- Do not use excessive spaces, as these will be rendered as '%20', e.g.
<http://sp2010.moray.gov.uk/template/houneed/Forms/Library%20View.aspx?RootFolder=%20template%20houneed%20Homeless%20Templates&Folder>
- Instead use Capitals for new words; TMCHousingTemplates.docx
- Meaningless terms such as "Jane's file", "general", "miscellaneous" etc. must not be used. Service specific conventions can be agreed, however, these must not contradict this general guidance document.

- Services should agree a list of abbreviations and acronyms e.g. The Moray Council (TMC)
Acronyms and abbreviations should be spelled out in full in the document text the first time they appear with the abbreviation in brackets for clarity.



HAPP = Housing Application

- Symbols cannot be used in document names or metadata, e.g. ~ " # % & * : < > ? / \ { | } □ ,
- Dates should be in the format YYYYMMDD i.e. 20161225. Use the full year, e.g. 2016.
- Follow these conventions for names:
 - Names should be in surname, forename format e.g. HawkingStephen
 - Enter prefixes such as d', von, van as part of the surname e.g. VonTrappMaria
 - Enter Mc or Mac as they are spelt e.g. McDonaldRonald
 - Enter surnames with hyphens as whole units e.g. Berners-LeeTim
- Page numbers should be added to documents.

Version Control

SharePoint2010 allows 6 major versions will be retained for all documents in SharePoint.

Version History				
No. ↓	Modified	Modified By	Size	Comments
6.0	04/03/2015 16:20	Alison McCook	32.5 KB	
5.0	04/03/2015 16:19	Alison McCook	32.5 KB	
4.0	04/03/2015 16:18	Alison McCook	32.4 KB	
3.0	04/03/2015 16:17	Alison McCook	32.4 KB	
2.0	04/03/2015 16:17	Alison McCook	32.4 KB	
1.0	10/02/2015 16:20	Alison McCook	31.2 KB	