



TRIM

Data Entry Standards

Records Management Unit

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Purpose and Scope

There are several fields in TRIM where users need to provide meaningful information to help facilitate retrieval at a later date. These include the Record Title for documents, the Free Text area of a file title and information for Contacts and Organisations. The Standards have been designed to ensure that information is captured in a uniform manner by all TRIM users, so that subsequent searches in TRIM retrieve all available information on a given subject, and do not miss items because of confusing or conflicting data entry that may not meet these standards. For this reason it is important that information entered into TRIM has the same 'look and feel', in order to provide reliability of retrieval.

As a general rule, all information should be entered in full unless an accepted abbreviation or acronym is listed in either the University's Functional Thesaurus (available on-line in TRIM or from the Records Management Unit Web Site) or in the standard lists within this guide.

Personal preference for the manner in which data is entered is not catered for in these Standards. Staff must adhere to this guide when entering information into TRIM.

Policy

It is the aim of the University to achieve and maintain a high level of efficiency, productivity and accountability. To do so it is essential that its TRIM data entry methods are both effective and consistent, and that they are systematically applied throughout the University. This will be achieved through the adoption of the principles contained in these Standards.

Responsible Officers

The Manager, Records & Information is accountable to the University Secretary for the day to day management of the Records Management Unit and the integrity of the corporate records management system. Individual managers are responsible for ensuring that record keeping and the data input and maintenance of records management systems in their areas meet the requirements of the references and these standards, and that their staff are adequately trained in the records management system (this should be considered a core competency for all staff).

Definitions

TRIM: (Total Records Information Management)

The University's Records and Document Management System.

Record Title:

The field in TRIM where the title of a file or document is created. This can be broken into two categories, Title (structured part) or Title (free text). For example in the case of a file the field is populated using authorised terms from the University's AAA Keyword Thesaurus. In the case of a document, this field is populated by a free text summary of the document subject matter.

Free Text:

The title fields where vocabulary controls by means of the thesaurus are not enforced, allowing a user to summarise in their own words, but within the parameters of this standard.

Locations:

A listing of people both internal and external to the University. These are split into the following categories: All, Contacts, Organisations and Internal Locations Directory

Noise Words:


A list of words that will not be indexed if they are used in record titles, notes etc, and therefore not searchable terms. Common Noise Words include: about, and, of, that, the, etc.

Contacts: are people from outside the University with whom the University corresponds or conducts any other business. **Does not include staff of the University, whose details reside in a different TRIM table.**

Organisations: can be Government departments and agencies, non-government organisations, private companies and businesses with whom the University corresponds or conducts any other business.

Addresses: the street and/or postal addresses of contacts and organisations with whom the University corresponds or conducts any other business.

Standard List: lists of authorised abbreviations for use in TRIM data entry.

KwikSelect button: is the yellow drop down folder used in TRIM to enable users to choose from a listing, shown by the following icon .

Standards

1. Data Entry Standards for Documents/Files (free text field)/Contacts/Organisations

- To avoid duplication, first ensure that the document, file, contact or location has not already been entered in TRIM by another user.
- Do not use punctuation including commas, inverted commas, apostrophes, etc. Full stops can be used if required. Slashes can be

used to separate words, but **MUST** always have a space before and after, **ie Launceston / Hobart**. Failure to do so will mean that TRIM searches for an entire word which includes the separator, eg. Launceston/Hobart.

- Hyphens must be used to separate different components of a free text title eg Project Number 65432 – Project Name, but it must have a space before and after the hyphen as with slashes.
- Hyphenated words, such as "co-ordination" etc. should not have the hyphen inserted, **ie it becomes "coordination"**.
- For consistency and ease of viewing, keep all text in normal prose format, ie capitals only for proper nouns and beginning of sentences. **DO NOT USE ALL UPPER OR LOWER CASE FOR ANY ENTRY.**
- Do not use abbreviations or acronyms unless permitted by the Thesaurus, or the standard abbreviation lists in this document. Use of ampersand (&) for "and" is acceptable and if acronyms are required they must be placed in brackets following the full name, ie. Australian Vice Chancellors Committee (AVCC). The reason for this is that acronyms/abbreviations change over time, or mean different things to different people. In a historical sense, an acronym commonly used today may mean nothing to those researchers of tomorrow, hence the context of the record is lost.
- Use the Australian standard date format in text, ie dd/mm/yy.
- Where the name of a month needs to be used, **DO NOT** abbreviate.
- For financial years use convention YYYY, with space, hyphen, space, between years ie 2000 - 2001.
- When referring to numbers use a digit format, except where a number forms part of a name, **eg Seven Mile Beach**.
- Name Conventions - names should be entered strictly as they are spelt, eg O'Brien, van der Bilt, etc. Asian names should be entered as they appear because in the majority of cases the family name is placed in front of the Christian name, **eg Feng Sui is entered with the surname of Feng and the First name of Sui**.
- Initials should be separated by a space, **ie B G O'Brien, B G Jones Pty Ltd**
- Address Conventions - Road, Street, Crescent etc can be abbreviated in accordance with standard abbreviations shown in the Street/Road Standard Abbreviations. Under no circumstances are the names of towns, suburbs, cities etc to be abbreviated.

- Avoid the use of filler words such as "memo about", "letter re", "email regarding" etc.
- Do not use the prefix "Department" or "Dept" prior to naming a Section of the University or Government Department, the correct, **unabbreviated** name is sufficient, eg Rural Health, Premier & Cabinet, Education Science & Training, Treasury, etc.
- Do not use the prefix "The" prior to naming organisations such as "The Mercury", "The Australian Newspaper", "The Ombudsmans Office". The name is sufficient eg. Mercury, Ombudsmans Office, Australian Newspaper.
- **NEVER** use non-definitive terms as "Various", "Various Departments", Various Deans etc, place each person in individually.

2.0 Record Title

2.1 Documents

Document titles should be sufficient to explain their context or meaning without having to read the document. Whilst excessively wordy titles should be avoided, sufficient information should be supplied to enable other users to gain an appreciation of what a document is about. Record titles for documents should not contain the name of the author, recipient, relationship to other documents, file number etc, as that information is captured elsewhere. All that should be entered in this field is a concise precis of the document contents without excessive use of the positive article (THE), and other "noise words" that clutter a precis without adding any value.

Abbreviations and acronyms must be avoided, as other users cannot be expected to guess how someone may have abbreviated a word or name.

Refer to Appendix 1 for recommended Naming Conventions for specific types of documents.

2.2 Files (*free text field*)

New files are generally created by skilled Records Management staff to ensure that the appropriate file classification structure is followed, and the creation of highly specific, single issue files, kept to a minimum. However, files are created at the request of users and there needs to be an awareness of what is appropriate in a request. All files will be titled using the University's Functional Thesaurus, which forces the first 2 – 3 hierarchical levels of a title to contain terms from the thesaurus. A free text area is also available to enable titles to include specific transactional information. As the third hierarchical level and the free text level are those most commonly searched when looking for a file, it is essential that free text titling is in accordance with appropriate data entry standards.

3.0 Contacts

With a Central Database, Data Such as Contacts and Organisations are entered once, but can be used many times.

Accuracy of Information Entered in this Database is vital, as it forms the basis of validation lists from which other users can make selections.

The Contacts register is the central database that maintains details of all people and organisations whose communication with the University is registered in TRIM. As many University staff will use this Contact & Organisation register we need to ensure the accuracy of data being entered and avoid duplication of entries.

- Contacts should be searched for initially **by surname only - if a surname consists of more than one word, or is hyphenated, then use only the first word.** This will bring up a list of all contacts with that surname, allowing users to select the correct one. If you are unsure of the correct spelling, enter the first three letters of the surname, and use the kwikSelect button to reveal a listing of surnames. If the correct contact is not revealed in the search, then a new one should be created.
- If a contact is internal to the University, ie a staff member, and their name does not appear in the initial contact search by surname, **please contact the Manager, Records & Information** to have them added as an internal location. **On no account should they be entered as a new external contact as this places them in an incorrect field.**
- Where possible, supply details **in full.** Entry of organisation, position, addresses, phone numbers etc assist in differentiating between two contacts with similar names.
- Where a single person has multiple or changes of roles in an organization or several organizations, you will need to create a new contact for each of those roles.
- Where a contact name is not supplied, but an organisation name is **use the organisation name as the contact.** Search for the organisation and either select the correct one, or create a new entry in the Organisation field.
- If correspondence is received from, or sent to, multiple contacts, a single contact should be selected for the initial entry and others added in the **Contacts folder** in the entry form.
- Where the contact is a Minister of the Crown, their surname and first name must be entered in the contact fields, **NOT the word "Minister".** "Minister" is the position/job title name.

3.1 *First Names & Surnames*

- All first names and surnames are to be spelt in full and must be in title case, NOT all upper or lower case, **ie John Smith.**
- Names containing punctuation are to _____ entered as they are spelt, meaning

that apostrophes must be entered where necessary, and hyphenated surnames are entered as they appear: ie, **McDonald, O'Brien, Fitz-William** etc.

- With Asian names, the first name that appears should be treated as the surname, **eg Feng Sui is entered with the surname of Feng and the First name of Sui.**

3.2 Titles

- Where possible, titles are to be used in names, ie **Mr J Smith, Prof D O'Brien** and entered in the *TITLE* field.

Title abbreviations must be used from the following Title Standard List. Do not make up your own title abbreviations.

TITLE STANDARD LIST

FULL NAME	ABBREVIATION
	Mr
	Mrs
	Miss
	Sir
	Ms
Associate Professor	A/Prof
Chief Executive Officer	CEO
Company	Co
Councillor	Cr
Deceased Estate	Est
Doctor	Dr
Father	Fr
Honourable	Hon
Master	Ma
Member of Parliament	MP
Member of the Legislative Council	MLC
Minister (Parliamentary)	Minister
Minister (Religion)	Rev
Professor	Prof
Reverend	Rev
Sister	Sr

4.0 Organisations

4.1 General

- Entering the first word of the Organisation's name should provide the correct search result. If a negative result is achieved it may pay to refine the search (F7) to a wildcard search eg. *Community * and filter the search for organizations only. This will bring up a list of all organisations whose name contains that word, allowing users to select the correct

one. If the correct name is not revealed in the search, then a new one should be created, or correction made to an inaccurate entry.

- Where possible, always supply details **in full**.
- Do not use contact names in the Organisation field.
- Where the contact is a Minister of the Crown, the organisation should be entered as the portfolio responsibility they are communicating under, ie Hon Paula Wriedt would have Education as her organisation NOT Minister for Education, or Office of the Minister, or Ministers Office or any other derivation of the same. Her position name is Minister.
- Organisations should be entered as:

Brown Brothers Pty Ltd

Trevor & Co

P T Smith Inc

Organisation abbreviations must be used from the following Organisation Standard List. Do not make up your own Organisation abbreviations

ORGANISATION STANDARD LIST

FULL NAME	ABBREVIATION
Associates	Assoc
Association	Assn
Brothers	Bros
Company Limited	Co Ltd
Corporation	Corp
Distributors	Dist
Incorporated	Inc
Limited	Ltd
Proprietary	Pty
Proprietary Limited	Pty Ltd
Saint	St
Trading As	T/A

Where an Organisation has not been supplied, or a contact does not represent an organization, leave the field blank.

If additional Organisation abbreviations are required, please contact the Manager, Records & Information

5.0 Addresses

5.1 General

- All addresses must be entered in title case.
- No punctuation is to be used in addresses, ie no commas or full stops

Street abbreviations must be used from the following Street

Standard List:

STREET/ROAD STANDARD LIST

Full Street Name	Abbreviation	Full Street Name	Abbreviation
Approach	App	Mews	Mews
Arcade	Arc	Mall	Mall
Avenue	Ave	Parade	Pde
Boulevard	Blvd	Pocket	Pkt
Boardwalk	Bwk	Parkway	Pkw
Bypass	Byp	Place	Pl
Centre	Ctr	Promenade	Prm
Chase	Ch	Point	Pt
Circle	Cir	Reach	Rch
Circuit	Cct	Road	Rd
Circus	Crc	Ridge	Rdq
Close	Cl	Round	Rnd
Corner	Cnr	Square	Sq
Court	Crt	Street	St
Crescent	Cres	Subway	Sub
Crossing	Csq	Terrace	Tce
Deviation	Dev	Throughway	Thru
Drive	Dr	Track	Trk
Esplanade	Esp	Trail	Tri
Expressway	Exp	Valley	Vly
Freeway	Fwy	View/s	Vw
Heights	Hts	Walk	Wk
Highway	Hwy	Walkway	Wkwy
Junction	Jnc	Way	Way

If additional Street/Road abbreviations are required, please contact the Manager, Records & Information

6.0 Other Standard Lists

STATE STANDARD LIST

STATE/TERRITORY	ABBREVIATION
Australian	ACT
New	NSW
Northern	NT
Queensla	Qld
South	SA
Tasmania	Tas
Victoria	Vic
Western	WA

POSTAL DELIVERY TYPE STANDARD LIST

POSTAL DELIVERY TYPE	ABBREVIATION
Care of Post Office Box	C/- PO Box
Community Mail Agent	CMA
Community Mail Bag	CMB
Community Postal Agent	CPA
General Post Office Box	GPO Box
Locked Bag	Locked bag
Mail Service	MS
Post Office Box	PO Box
Roadside Delivery	RSD
Roadside Mail Bag/Box	RMB
Roadside Mail Service	RMS
Private Bag	Private Bag

MULTISTORY BUILDING STANDARD LIST

BUILDING LEVEL	ABBREVIATION
Basement	B
Floor	Fl
Foyer	Foyer
Ground Floor	G
Level	L with no space before level number
Lower Ground Floor	LG
Mezzanine	M
Suite	Suite
Upper Ground Floor	UG

Reference:

ISO 15489-1 International Standard on Information and Documentation Records Management - Part 1: General

ISO 15489-2 International Standard on Information and Documentation Records Management - Part 2 – Guidelines

Australia Post Address Presentation Standards incorporating (AS4590-1999 Interchange Client Information)

Queensland Government Department of Innovation and Information Economy, Sport & Recreation Corporate Standard IM.07.003

Contact Officer: Manager, Records & Information

Action Officers: Records Management Officers
All TRIM Users

Naming Conventions

Type of Document	Naming Convention
Committee Minutes & Agenda's	Meeting Number (if applicable) - Committee Name – Define whether Minutes or Agenda – Define if Special Meeting if applicable - Date of Meeting (Date in full, eg 8 September 2008) <i>Eg. 01/08 – Records Management Steering Committee – Agenda – 15 January 2008</i>
Invitations	Invitation – (Name of invitee) – (date of function) – (type of function) – (Sponsor) <i>Eg. Invitation – John Smith – 05/05/08 – Dinner Party – Alphawest</i>
Letter of Appointments	Letter of appointment – (Type of appointment/position) – (Location of appointment) – (Date range specified 00/00/00) – (Name in full) <i>Eg: Letter of appointment – Honorary Associate – School of Business – 01/01/08 – 31/12/12 – John Smith</i>
Student Complaints Request for review	Student Complaint Review – other names SURNAME – ID no. – Student Request <i>Eg Student Complaint Review – Sonia NELSON – ID 123456 – Student Request</i>
	Student Complaint Review – other names SURNAME – ID no. - Acknowledgement
	Student Complaints Tribunal – other names SURNAME – ID no. – document name or description
	Graduate Research Complaints Committee – other names SURNAME – ID no. – document name or description
Complaints Appeals	Complaint Appeal - other names SURNAME – ID no – Student Request
	Complaint Appeal – other names SURNAME – ID no. - Acknowledgement
	Complaints Appeals Committee – other names SURNAME – ID no. – document name or description
Appeals Against Exclusion/Complaints Appeals (Specific to Academic Progress Reviews)	Appeal Against Exclusion – other names SURNAME - ID no. – Student Request
	Appeal Against Exclusion – other names SURNAME - ID no. – Faculty Determination
	Appeal against Academic Progress Review Committee decision – other names SURNAME - ID no. – Student Request
	Appeal against Academic Progress Review Committee decision – other names SURNAME - ID no. – Acknowledgement
	Complaints Appeal Committee – other names SURNAME - ID no. – document name or description

Student Discipline Academic Misconduct	Academic Misconduct – other names SURNAME – ID no. – unit code – Examinations Office Report
	Academic Misconduct – other names SURNAME – ID no. – unit code – School allegation Or Academic Misconduct – other names SURNAME – ID no. – unit code – School allegation & evidence
	Academic Misconduct – other names SURNAME – ID no. – unit code – School determination
	Academic Misconduct – other names SURNAME – ID no. – unit code – School determination & referral to Academic Misconduct Committee
	Academic Misconduct Committee – other names SURNAME – ID no. – unit code - advice to student of referral
	Academic Misconduct Committee – other names SURNAME – ID no. – unit code –document name or description
Academic Discipline Appeals	Discipline Appeal – other names SURNAME – ID no – unit code – Student Request
	Discipline Appeal – other names SURNAME – ID no. – unit code - acknowledgement
	Discipline Appeals Committee – other names SURNAME – ID no. – unit code - document name or description
Student Discipline General Misconduct	General Misconduct – other names SURNAME – ID no. – allegation Or Academic Misconduct – other names SURNAME – ID no. – allegation & evidence
	General Misconduct – other names SURNAME – ID no. – determination
	General Misconduct – other names SURNAME – ID no. – referral to Executive Director Finance & Administration
	Discipline Appeal – other names SURNAME – ID no – Student Request
	Discipline Appeal – other names SURNAME – ID no. – Acknowledgement
	Discipline Appeals Committee – other names SURNAME – ID no. – document name or description
University Medals (Awarded to 13 exceptional students by Academic Senate & Teaching & Learning)	University Medals Year – document name or description Eg. <i>University Medals 2008 – Faculty of Health Science nomination – support for nominee</i>

<p>University Policy & Procedures</p>	<p>Operational Policy/Procedure - Name of Operational Policy or Operational Procedure – Section code & Number</p> <p>Eg. Operational Procedure - Access to Restricted University Archived Records by Members of the Public – CORPR 9.1</p> <p>Section Code & Numbers are issued from Governance & Legal Office and include the following abbreviations.</p> <p>CORP= Corporate Policy CORPR= Corporate Procedure FINP= Financial Policy FINPR= Financial Procedure HRP= Human Resources Policy HRPR= Human Resources Procedure PTIP= Physical & Technical Policy PTIPR= Physical & Technical Procedure RESP= Research Policy RESPR= Research Procedure TLP= Teaching & Learning Policy TLPR= Teaching & Learning Procedure</p> <p>EDFA = Executive Director Finance and Administration DAMS = Director Asset Management Services DGL = Director Governance & Legal DHR = Director Human Resources DPRUE = Director Public Relations & University Extension Unit DVCAP = Deputy Vice-Chancellor (Academic) and Provost UTLC = University Teaching and Learning Committee VC = Vice-Chancellor</p>
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