Policy | Procedure

LFB
LONDON FIRE BRIGADE

Records Management Strategy 2: Creating new documents or saving records

New policy number: **576**
Old instruction number: **MAN:A015:a2**
Issue date: **16 April 2008**
Reviewed as current: **12 May 2023**
Owner: **Chief Information Officer (CIO)**
Responsible work team: **IM Document Management**

Contents

1   Introduction

1.1   This policy sets out what information to include when creating a new document.

2   Creating and naming new documents

Naming documents in SharePoint

2.1   Previous versions of SharePoint encouraged the use of extensive metadata, changes to the system with vastly improved searches and easy access to recently used documents negates the use of extensive metadata in most sites. These changes make it far easier to create and save documents/records. This also means it is extremely important to give sites, libraries and most importantly documents, a sensible/descriptive name e.g. 'DRAFT Records Management Strategy' as this will be used by you and others when trying to locate a document, possibly a long time in the future when the document might be required.

2.2   Following these basic principles when naming a document will enhance the new improved search.

- **Be descriptive** and use key words in the name. It is not necessary to have a short or abbreviated name. Someone else is likely to want to find a document that you have created. Try to use words that other people would use when looking for your document.
- **Be consistent.** To help others find your documents you must be consistent in naming documents. You need to agree a standard document titling policy in your work area.
- **Do not use numbers or abbreviations.** For example, do not name a document '27dw1234-3'. No one else will know what the document is or how to find it and you will only remember the name for a short while.
- **Do not be too generic.** Retrieving documents quickly will be difficult if there are fifty documents with similar titles e.g. 'User Guide' or 'Training document or 'Letter 1'.
- **Do not use special characters.** These special characters should not be used in the title. * and ? " < > | % @ + / \ : () as Windows will not recognise them.
- **Be careful with using people's names in the title** as they may not want their name displayed.
- **Dates** – The recommended format when adding dates to a document title is YY/MM/DD. Adding the date to the beginning of a document makes them easier to sort and find. This naming format is especially recommended for series of documents of the same name, as shown in the following examples.

2.3   Examples of descriptive document names:

Document	Title
Agenda	*170511 Committee name Meeting Agenda*
Minute	*170511 Minutes ICT Management Meeting*
Report	*Firefighters' Pension Scheme consultation report*
Letter	*London Resilience Letter – Programme Update*
Notes	*Representatives on Outside Bodies*

2.4   SharePoint now includes an auto save function and no longer uses the metadata field 'Document Status - Draft or Final'. This means that versions are maintained within SharePoint. For clarity once a document is complete (a final version) this and the date should be included on the document, an example might be: ICT Strategy published version June 2022.

2.5   Some of our SharePoint systems include functionality which prohibits final/published versions documents from being amended, for example - Policies and Reports in Brigade Wide Documents (BWD) and contractual documents held in the My Employment/ePRF system).

3   Writing for the Freedom of Information Act/Data Protection Law

3.1   When writing, whether the document is an email or formal report, it is important to keep the following points in mind:

- Write objectively, using impartial, unbiased and neutral language in all documents.
- Support your opinions with facts.
- Ensure all information is relevant, accurate and up-to-date.

3.2   It is good practice to conduct regular audits or 'clean-outs' of information and archive, or destroy, any unnecessary or out-of-date information. Make sure you follow Policy number 879 - Records Management Strategy 5: Records retention, on the retention of records before destroying documents or contact the document manager for retention advice.

Document history

Assessments

An equality, sustainability or health, safety and welfare impact assessment and/or a risk assessment was last completed on:

EIA	17/08 08	SDIA	L - 27/02/26	HSWIA	15/05/23	RA	NA

Audit trail

Listed below is a brief audit trail, detailing amendments made to this policy/procedure.

Page/para nos.	Brief description of change	Date
Page 2	Removed warning. Removed references to metadata and reinforced importance of naming documents for search pruposes.	12/05/2023
Pages 4 & 5	Removed references to versioning and document status metadata field. Updated policy new auto save versioning of documents in SPO.	
Page 4	SDIA updated.	19/05/2023
Page 4	SDIA date updated.	09/03/2026

Subject list

You can find this policy under the following subjects.

Records management	

Freedom of Information Act exemptions

This policy/procedure has been securely marked due to:

Considered by: (responsible work team)	FOIA exemption	Security marking classification