Containers

Containers are how we sort and collate our information.
You can think of a container as a folder where information is aggregated for a particular purpose.
At SCHN we use primary containers as the main receptacle and secondary containers where necessary to further separate information into subgroups or sub-categories.

📁 Primary containers are shown as yellow folders.

📁 Secondary containers are shown as orange folders.

What is a primary container?

A Primary Container is created on an as needs basis by the work area responsible for the subject. Containers are most usually created annually and used for one year e.g. committee records, and others may be active over multiple years e.g. a one off project.

Primary containers are titled according to a controlled list of terms and conventions which identify business functions and their associated activities and transactions, a Business Classification Scheme (BCS). The BCS is followed by free-text which further describes the container's subject.

Containers are numbered sequentially with the numbering system - YY/nnnn
*Two numbers representing the year of creation "YY" and lastly 4 automatically generated digits 'nnnn'

A primary container might look something like this:

| 📁 21/0005 | INFORMATION MANAGEMENT - Data Standards | Sydney Children's Hospitals Network (SCHN) HP TRIM test container 2021 |

What is a secondary container?

Secondary containers sort primary documents into subgroups or sub-categories and live under a primary container and so carry the record number of the primary container followed by a dash (-) and a sequential number starting with one (1) and display in reverse order under the primary container - YY/nnnn-1

| 📁 21/0005-1 | EDRMS Example Secondary Container 2021 |

Check out the Corporate Records intranet for further advice on recordkeeping
Contact the Records Manager with records management questions

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What information do you need to create a new primary container?

Does it already exist?

The first step is to check that the container has not already been created. This avoids duplicate containers.

- Conduct a search.
- Look for keywords not necessarily an exact phrase.
- Try refining the search by record type

Ask a colleague

Whilst a name may seem obvious to you, ask a colleague who works in a similar field. They may know if a container has been created or provide alternative words for you to search by.

Title

Classification = Function and Activity

(Found in Content Manager under SEARCH>Classifications)

Container titles are consistent with the titling conventions set out in the controlled Business Classification Scheme (BCS)[1] where a predetermined list of Function and Activity descriptors are used to describe the information contained within the container.

Function and Activity:
- link information and records relating to the same activity or purpose
- be consistent in titling
- develop a systematic framework for the creation, management and disposal of records

> **NB** – The Classification is used to allocate a Retention Schedule to a container.
> A retention schedule assists in identifying how long we can keep our records.

Title (Free Text Part)

This section allows you to insert more descriptive information like contents of a container or an outcome. Generally, free text includes project or committee names, keywords words, years.

Free text it should ideally be short and concise. It is often these elements that people will recall when they wish to search for a container so choose words that will help retrieval.

Remember with acronyms, introduce the full term first with the acronym in brackets e.g. The Sydney Children's Hospitals Network (SCHN).

See the user guide on Free Text Titling for further information

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[1] What is a Business Classification Scheme (BCS)? A BCS uses terms to identify business functions and their associated activities and transactions. It captures what the organisation does and how we do it.

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SAMPLE CONTAINER TITLING STRUCTURES

Record	Sample Title Structure	Examples
Program	[Function] + [Activity] - [Site] - [Service/ Directorate] - [year]	CLINICAL PRACTICES & QUALITY IMPROVEMENT - Clinical Services - CHW - Surgery 2023 STATEWIDE SERVICES - Planning - NSW Organ and Tissue Donation Service - 2023
Committee	[Function] + [Activity] - [Site]- [Name of Committee] - [year]	CLINICAL PRACTICES & QUALITY IMPROVEMENT - Committees - SCHN Policy, Procedure & Guidelines Committee (PPG) – 2023 TARGET GROUPS - Committees - Priority Populations Program - Heads of Department Meetings - 2023
Meeting	[Function] + [Activity] -[Site] [Name of Meeting] - [year]	CLINICAL PRACTICES & QUALITY IMPROVEMENT - Meetings - SWSLHD & SCHN Collaborative Steering Committee 2023 GOVERNANCE AND PERFORMANCE - Meetings - Senior Executive Forum (SEF) 2023 NURSING AND MIDWIFERY - Meetings - SCHN Admissions Policy Working Group - 2023
Project	[Function] + [Activity] – [Site] [Project Name] – [year/s]	CLINICAL PRACTICES & QUALITY IMPROVEMENT - Improvement Projects - Westmead (CHW), Randwick (SCH) and Network (SCHN) Innovation Forum 2023 GOVERNANCE AND PERFORMANCE - Projects - NSW Health Data Governance Program 2023 INFORMATION TECHNOLOGY AND TELECOMMUNICATIONS – Projects – Medtasker 2023

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Creating containers

Guides on Learning.kids

- Content Manager - Creating - New Container
- Creating - New record

📁 Create new Primary Container in Content Manager go to
New record > **SCHN EXEC PRIMARY CONTAINER**

* Any fields with a red asterix are mandatory.

Field	Description
General Tab	
* Classification	Business Classification = function and activity descriptor
* Title (Free Text Part)	Description of contents, year
Related Record	Input related containers or the previous year's container
* Date Created	Will default to the today's date so leave as is or input date of first document
* Home Location	Leave as is (defaults to Executive Unit)
* Owner Location	Leave as is (defaults to Executive Unit)
Retention Schedule	Leave as is (For Archival use)
Disposition	Leave as is (defaults to Active)
Archive or Destroy	Leave as is (For Archival use)
Date Archived or Destroyed	Leave as is (For Archival use)
Security and Access Tab	
Access Controls	Restrict record access to the container if the contents are of a sensitive nature

Remember: correct spelling is as important as useful titles! Always check your spelling.

📁 Secondary Containers can be created under its Primary Container
New record > **SCHN EXEC SECONDARY CONTAINER**
        or
Right click on the associated primary container
New > New record > **SCHN EXEC SECONDARY CONTAINER**
(this will complete the *Primary Container Number* field for you)

Field	Description
General Tab	
* Title (Free Text Part)	Category name, meeting month or purpose of sub-container
Primary Container Number	The primary container number this is associated with
Retention Schedule	Leave as is (For Archival use)
* Date Created	Will default to the today's date: leave as is or input date of first document
Date last used	Leave as is

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Date Created

Defaults to the date container is registered but you can change this to the date of the first document on file.

Location

Locations can be a place (Container) or a person (Position)
Home – The unit which is the overseer of the records. This field defaults to "SCHN - Executive Unit" and for most records this will remain.
Owner – The Directorate responsible for the record. By allocating an owner directorate, users can filter searches according to the records they oversee. NB this is not an access control and does not prevent other directorates to view. This field defaults to "Executive Unit" and can remain so if you want.

Relation

Relating containers allows users to easily refer to other containers which may contain similar information.
Common reasons to relate records are,

- when a container is superseded at the change of year and
- when another record exists pertaining to the same matter.

Sensitivity

Users must consider access requirements. Some documents may contain sensitive information particularly topics involving personnel, audit or legal issues.
Containers and documents containing sensitive information can be restricted to relevant user positions such as Access Groups.
Appropriate access controls will avoid information security breaches.
Failure to apply appropriate access may lead to performance management.

Access Controls default to "Everyone". Any record containing information of a sensitive nature must have its access restricted to only those users that "need to know".
Audit logs will show if there has been any authorised access to a document.