

UNSW File Request Form

RAO01: Opening a new TRIM File



For the creation of a new File registered in the corporate recordkeeping system, TRIM

1. Register a: (select one)

NEW FILE **NEW PART FILE** (current year only, exception - legal/case files)

2. Date: _____

3. Contact Information:

School/Department/Unit:			
Staff Member:		Job Title:	
Email:		Phone:	

4: Keyword

(Put one keyword here. See over for list)	
Activity Descriptor	

5: File Title

(Be as descriptive as possible)

6: Related Files

(List the file numbers of all related files)
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7: Send to

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8: Records Use Only

QC Check:	Date:
File No	Date:

How to complete the sections of this form:

1. Tick a box to request the opening of a **new file**, or **new part file**.
RAO will only create part files for matters which are being dealt within an academic year (Legal or case files excluded.)
A part file is only necessary for matters handled within an academic year when the initial file has too many papers on it, otherwise a new file can be created and related to the original file if required. This becomes important when the file contents are assessed for disposal.
2. Today's **date**.
3. Full details for the **person requesting the file**.
4. Select a **Keyword** and **Activity Descriptor**
UNSW uses a *Functional Thesaurus* to classify records. This defines records according to the business function being carried out through the use of a mandatory **Keyword** and **Activity Descriptor**.
Guidelines on how to select an appropriate Keyword and Activity Descriptor (and the terms themselves) can be found on our website at: <http://www.recordkeeping.unsw.edu.au/procedures/procedures.htm>, or you may contact the Records and Archives Office directly for advice on file titling.

Here are the Keywords currently used at UNSW:

ASSESSMENT MANAGEMENT	FLEET MANAGEMENT	PUBLICATION
AWARDS MANAGEMENT	GOVERNMENT RELATIONS	RESEARCH MANAGEMENT
COLLECTIONS MANAGEMENT	INDUSTRIAL RELATIONS	STAFF DEVELOPMENT
COMMERCIALISATION	INFORMATION MANAGEMENT	STRATEGIC MANAGEMENT
COMMUNITY RELATIONS	LEGAL SERVICES	STUDENT MANAGEMENT
COMPENSATION	OCCUPATIONAL HEALTH & SAFETY	STUDENT SERVICES
EQUIPMENT & STORES	PERSONNEL	TEACHING & LEARNING
ESTABLISHMENT	PROGRAM MANAGEMENT	TECHNOLOGY & TELECOMMUNICATIONS
EXTERNAL RELATIONS	PROPERTY MANAGEMENT	UNIVERSITY GOVERNANCE
FINANCIAL MANAGEMENT		

5. **File title** Further terms that make up the file title.

They should identify the nature of the business transaction. You can find appropriate terms in the UNSW Thesaurus on the Records and Archives Office website, or you can use your own words.

A file title will detail:

- work projects being managed or undertaken by UNSW staff or contractors;
- individuals and companies or other organisations being assisted and advised by UNSW;
- industry and community organisations on which UNSW is formally represented or has some other interest;
- information, products or services being offered, sold to, evaluated or procured by UNSW;
- UNSW information, products or services being offered, sold to, evaluated or procured by individuals and other organisations;
- maintenance and management of UNSW assets, financial and human resources, policies /procedures
- people and organisations making inquiries, representations, requests or complaints;
- the location(s) at which work is being undertaken;
- the Financial or Calendar Year in which the transaction(s) occur.

Further instructions regarding Keyword titling can be found on the Records and Archives Office website.: <http://www.recordkeeping.unsw.edu.au> .

Problems/Enquiries: email us at records.admin@unsw.edu.au