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)

7. **Send to**

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:

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<tr>
<th>ASSESSMENT MANAGEMENT</th>
<th>FLEET MANAGEMENT</th>
<th>PUBLICATION</th>
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<tr>
<td>AWARDS MANAGEMENT</td>
<td>GOVERNMENT RELATIONS</td>
<td>RESEARCH MANAGEMENT</td>
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<tr>
<td>COLLECTIONS MANAGEMENT</td>
<td>INDUSTRIAL RELATIONS</td>
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<td>COMMERCIALISATION</td>
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<tr>
<td>COMMUNITY RELATIONS</td>
<td>LEGAL SERVICES</td>
<td>STUDENT MANAGEMENT</td>
</tr>
<tr>
<td>COMPENSATION</td>
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<td>STUDENT SERVICES</td>
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<td>EQUIPMENT &amp; STORES</td>
<td>PERSONNEL</td>
<td>TEACHING &amp; LEARNING</td>
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<td>ESTABLISHMENT</td>
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<tr>
<td>FINANCIAL MANAGEMENT</td>
<td>PROPERTY MANAGEMENT</td>
<td>UNIVERSITY GOVERNANCE</td>
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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