

UNSW Online File Request Form

An overview for administrative staff



To assist UNSW staff order Registered files using the Online Form available.

About

This document is intended to assist UNSW staff complete the Online File Request Form located at http://www.recordkeeping.unsw.edu.au/Forms/online_order_form.html

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Introduction

Background

The Online File Request Form located [here](#) allows UNSW Staff to order Registered files from the Records and Archives Office.

The Form sits alongside the RAO01 File Request Form and direct contact with the Records and Archives Office as a means to request a new file.

Process

To Request a New File:

1. Client Unit completes Online File Request Form.
OR
2. Client Unit completes RAO01 File Request Form
OR
3. Client Unit contacts Records and Archives Office directly to request file.

This Procedure relates specifically to #1, the Online File Request Form.

Completing the Form

This is a sample of the web-based form to be used when requesting new files, it needs to be completed as fully as possible.
 The online form can be found [here](#)

Sample Form:

Please Create a:	New File	New Part File
Date:	Today's Date	
Staff Member: (requesting file)	Name	
	Title	
	Unit/School/Faculty	
Keyword:	<drop down menu> see <i>Keywords on following page</i>	
Activity Descriptor:	<drop down menu> see <i>Activity Descriptor on following page</i>	
Freetext:	<freetext to complete the file title>	
Previous File:	(if any)	
Next File:	(if any)	
Related File(s):	(if any)	
Other Information:	(any information you feel relevant)	
Send to:	Me	
	Other <specify>	
	Records and Archives Office for storage	

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 supersedes 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: https://www.recordkeeping.unsw.edu.au/Procedures/registered_file_users.html#3, 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. **Freetext** 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.

If you're having problems completing this form, please contact the Records and Archives Office for assistance.

Keywords and Activity Descriptors

A summary of Keywords and Activity Descriptors used:

■ **Keywords:**

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

□ **Activity Descriptor:**

The Activity Descriptor used is dependent upon the Keyword selected. The Online Form automatically limits your Activity Descriptor selection to those available under Keyword selected.

A full list of Activity Descriptors available and detailed Keyword definitions can be found on the Records and Archives Office website under *Procedures*.

Further Questions

If you would like further advice with any aspect of this process, please contact the Records and Archives Office.

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