RM009 – CREATING A FILE

1. On the toolbar at the top of the FileMaster screen, click ‘FileMaster’ and select ‘Create File’.

Or you can type Ctrl + T (keyboard commands are indicated in the drop down menu).



1. The file will appear with empty fields.
* Use Tab to move through the fields.
* To go back to a field you can use the mouse (or keep pressing Tab).
* Some details are entered automatically eg Date Raised.
* Some fields require you to enter data before allowing you to proceed eg. Subject/Title and Classification.



1. Guidelines for Data Entry

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| **Header** | The three letters indicate your work group - school, division or unit. (University Organisational Unit 2) |
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| **Extension** | Each header has a default numerical sequence from 0001 to 9999. FileMaster automatically enters the next available number. Each file has a unique number - please do not override this number. |
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| **File Number** | Appears automatically - combination of the Header and Extension.Once you have created a new file it is important to write the File Number on the folder so that you can keep track of the hard copy files you have entered on FileMaster.For example:**SVS/0132**Header Extension |
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| **Subject/Title** | Type in the title of the file. It is important to choose a title that appropriately describes the contents.Other people will need to identify the file (now or in the future) so it is important you use subject or key words. Don’t use shortened words or acronyms (unless you put an explanation in the Comments).You may also want to include dates to separate a range of files with the same title. This will make it easier to identify when searching – you will be able to see which file you need from the selection list instead of having to go into each individual file.For example: Group Certificates 1996 – 1997 |
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| **Classification** | This describes the *type* of record the file is eg Committee papers, photos, bound reports etc.To obtain a list of classifications on the screen, type ?? in the box and press enter. A drop-down menu will appear – select the most appropriate description by double-clicking the mouse. |
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| **Date Raised** | Automatically appears – the date the file was created. |
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| **Contents From** | If you are entering documents, leave these fields blank – FileMaster automatically enters the dates of the first and last documents. If you enter data into this field, this automatic feature is switched off and cannot be restored.You can enter the dates in a variety of formats – you must use the same format in both boxes.Year only – YYYYMonth and Year – MM (space or /) YYYYDay, Month and Year – DD (space or /) MM (space or /) YYYYFileMaster automatically formats the month to appear as words eg 06 = Jun |
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| **Home Location** | Automatically entered by FileMaster – this is linked to the Header. |
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| **Current Location** | FileMaster will automatically enter a Current Location – generally it is the same as the Home Location. You can override this by typing the location code in the box. If you are unsure of the code, type ?? and press enter. A drop-down menu will appear. Select the correct location by clicking the mouse. |
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| **Review Date** | To be left empty |
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| **Comments** | This is where additional information that may be useful can be entered eg notes, summary of contents or the full title of acronyms (AVCC – Australian Vice Chancellors Committee).This field is used when files are archived and sent to off-site storage. The box number and barcode number are recorded here eg SVS Box 40. |
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| To finish creating a file, click OK (on the top right hand side). Click OK when asked if you want to continue without a review date. If you do not want to save the file you have created, click on Cancel – the file will not be saved or recorded. |