FILE ISSUE SERVICE

ArchivesGateway user guide

Queensland State Archives

July 2020

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Introduction

This user guide provides an overview and instructions of how to search your agency's records in ArchivesGateway and how to submit a request to retrieve or access your records at Queensland State Archives (QSA) through the File Issue service.

Note: The File Issue service is a fee based service. Find out more about the File Issue service.

The information in this guide applies to all government agency staff involved that use ArchivesGateway to manage and access their records at QSA.

See the ArchivesGateway user guide: Manage users and locations for information on how to access ArchivesGateway, create users and set user permissions.

See the ArchivesGateway user guide: Searching records and Search requests service for more information on how to:

- search for the required records **before** submitting a File Issue request

- submit a search request if you are unable to locate the required records yourself.
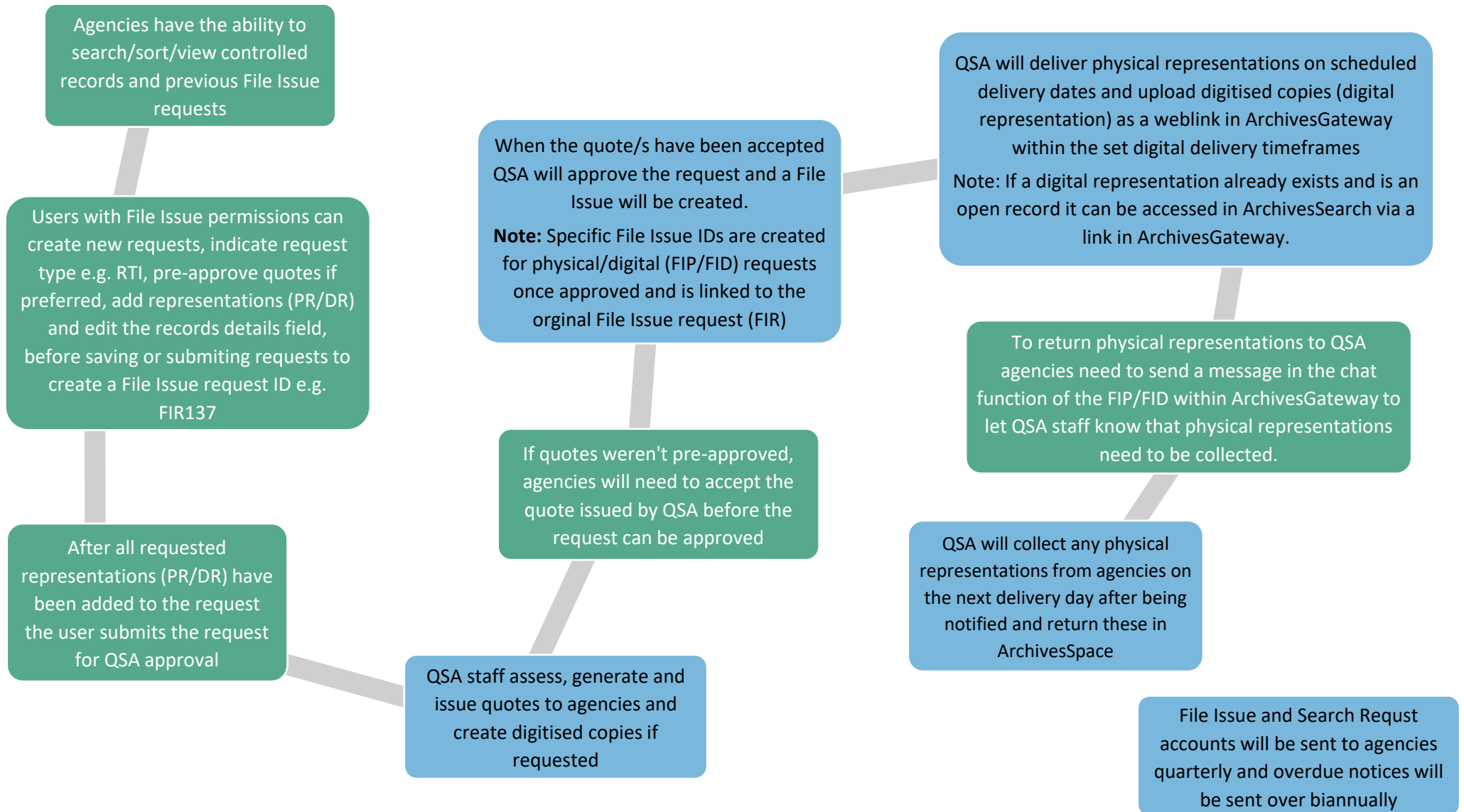
Other user guides are available for other functions within ArchivesGateway. See the more information section for details on how to find and access these other user guides.

Definitions and references

Relevant definitions of recordkeeping and archival terms used in this guide can be found in the glossary on the website.

See recordkeeping and archival terms and their definitions.

Brief overview of File Issue process

Agencies have the ability to search/sort/view controlled records and previous File Issue requests

Users with File Issue permissions can create new requests, indicate request type e.g. RTI, pre-approve quotes if preferred, add representations (PR/DR) and edit the records details field, before saving or submiting requests to create a File Issue request ID e.g. FIR137

After all requested representations (PR/DR) have been added to the request the user submits the request for QSA approval

QSA staff assess, generate and issue quotes to agencies and create digitised copies if requested

If quotes weren't pre-approved, agencies will need to accept the quote issued by QSA before the request can be approved

When the quote/s have been accepted QSA will approve the request and a File Issue will be created.
Note: Specific File Issue IDs are created for physical/digital (FIP/FID) requests once approved and is linked to the orginal File Issue request (FIR)

QSA will deliver physical representations on scheduled delivery dates and upload digitised copies (digital representation) as a weblink in ArchivesGateway within the set digital delivery timeframes
Note: If a digital representation already exists and is an open record it can be accessed in ArchivesSearch via a link in ArchivesGateway.

To return physical representations to QSA agencies need to send a message in the chat function of the FIP/FID within ArchivesGateway to let QSA staff know that physical representations need to be collected.

QSA will collect any physical representations from agencies on the next delivery day after being notified and return these in ArchivesSpace

File Issue and Search Requst accounts will be sent to agencies quarterly and overdue notices will be sent over biannually

1 Search for records

Before submitting a File Issue request, you will need to search for the records you wish to access.

See the ArchivesGateway user guide: Searching records and Search requests service for more information on how to:

- search for the required records for a File Issue request

- submit a search request if you are unable to locate the required records yourself.
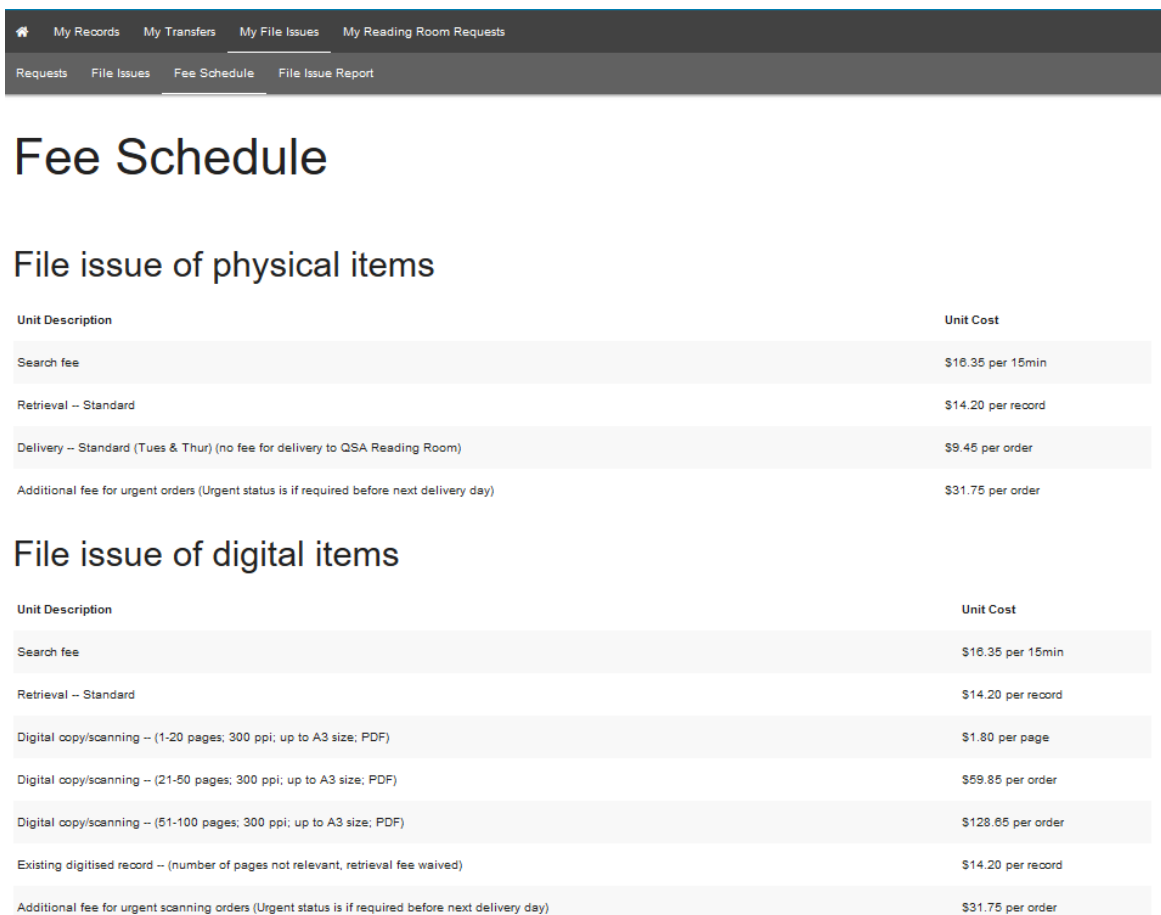
2 Fee schedule

2.1 Viewing the fee schedule

The fee schedule in ArchivesGateway displays the fees involved in using the File Issue service.

To view this fee schedule:

1. Click on 'My File Issues' along the top bar

2. Then click on 'Fee Schedule'.

This will then display the fee schedule for the File Issue services, for both physical and digital items.

3   View and manage File Issue requests

You can view all past and active File Issue requests in the 'My File Issues' tab in ArchivesGateway.

3.1   View File Issue requests

You can filter File Issue requests to help find specific requests in the My File Issues.

When you are in the File Issue Request page, under My File Issues in ArchivesGateway, you can filter the requests by Digital Request and Physical Request Status.

There is also a sort by section that provides a range of ways that you can sort the results.

3.2   File Issue request status bar

Each File Issue Request created and submitted to QSA includes a status bar.

This status bar tracks the progress of a File Issue Request, whether digital or physical.

Note: 'Digital Request Status' bar is the default until representations are requested physically.

When representations are requested physically, a 'Physical Request Status' bar will appear.

If the representations are only requested physically, the 'Digital Request Status' bar will disappear.

3.3   File Issue requests and Machinery of government changes

If your agency is no longer responsible for some records because of a machinery of government change (MOG), you:

- will be able to see requests for records you are no longer responsible for

- will NOT be able to see which records were requested.

4   Create a File Issue request

If you wish to access your agency's records held at QSA via our File Issue service, you must create and submit a File Issue request. This applies to both open and closed records.

To create a File Issue Request:

1. Click on 'My File Issues' along the top bar

2. Click on 'Requests'

3. Select the 'Create Request' button.

4. After clicking on the 'Create Request' button, it will open the File Issue request form.

4.1   Filling out the request form

To complete the request form:

5. Select the request type from the drop down

    a. Right to Information

    b. National Redress Scheme or related

    c. Disability Royal Commission

    d. Aged Care Royal Commission

    e. Commission of Inquiry – Other

    f. Other (default)

6. If the request is urgent, tick the 'urgent' tick box.

    Note: Urgent requests will be indicated by a flag to QSA (urgent fees apply)

7. Select the appropriate method of delivery:

    a. Agency location (default) – for deliveries

    b. Agency arranged courier – for pick-ups.

    Note: Ensure the Agency Location field reflects the location within your agency that is requesting the records.

8. Provide details of the preferred person to receive/collect the File Issue.

    Note: This can be the requesting user, another employee or courier company if the requesting user is not available

9. If the cost of the file issue request is pre-approved, tick the 'pre-approve quote' check box.

    See Viewing and approving quotes for more information.

Agency location details

When completing a File Issue request, please ensure that the Agency Location field reflects the location within your agency that is requesting the records.

For example, if your agency has a location for regular File Issue Request and one for File Issue Requests related to National Redress Scheme (NRS) and you want to do a NRS File Issue Request, make sure you are in the Agency Location that relates to NRS for that request.

See the ArchivesGateway user guide: managing users and locations for more information on different locations and how to switch between locations.

4.2 Adding records to a request

Once all of the request details have been provided, you need to add the records that you would like to access.

Note: in ArchivesGateway, the records that you request are called representations and can be either physical or digital. Find out more about representations.

To add records/representations, to the request:

1. Click on the 'Add Records to Request' button.

2. A search window will pop-up.

3. Search for the records/representations you would like to add to the request.

   1. **Note:** For information on how to search within this window, see the instructions on searching for records in ArchivesGateway.

4. When you have located the representations required, click on the 'add' button next to the representation to add them to the request.

5. The button will then change to allow you to remove the representation if necessary.

   For more information, see the section on <u>Removing representations from a request</u>.

6. Once all the required representations have been added to the request, close the search window clicking on the 'X' at the top of the screen or click outside of the window on the grey section.

Adding additional information to representation details

You can add additional information to each representation in the request form by using the 'Records Details' text box.

For example, this text box can be used to:

- notify QSA of a specific section you need digitised.

- provide details of a specific representation needed within a box that is listed at box level

- add information about business units requesting records, billing codes etc.

Digital Request Summary

Physical Request Summary

4.3   Changing from digital to physical delivery

Physical representations added to a File Issue request will **automatically default to a digitised copy** and creates a digital file issue request.

To change to a physical representation request:

1.   In the request summary, find the records you want to receive physically.

2.   Go to the drop-down menu next to the item.

3.   Change the issue type from 'digitised copy' to 'original'.

4. This will then move those files to create a physical file issue request.

Note: You can use a single File Issue request to request both physical and digital records OR you can submit separate requests for the physical and the digital records.

4.4 Removing representations from a request

Digital and physical representations added to a File Issue request form can be removed if no longer required. This can be done up until the quote is approved.

Note: if the quote is pre-approved, representations cannot be removed after submission.

Representations can be removed via the 'add records to request' window, or in the request summary.

Via the 'add records to request' window

To remove a representation via the 'add records to request' window:

1. Navigate to the File Issue request in the list of 'My File Issues'.

2. Click 'add records to request' button.

3. Find the representations you wish to remove.

4. Click on the 'remove' button on the right.

5. Exit out of the 'add records to request' window.

6. Save or submit the request as required.

Via 'Request summary' window

1. Navigate to the File Issue request in the list of 'My File Issues'.

2. Click 'View' to see the details and representations included with the request.

3. Scroll down to the digital or physical request summary sections.

4. Find the representations you wish to remove.

5. Click on the 'remove' button next to the relevant representations.

Digital Request Summary

View Fee Schedule

Items Requested

Issue Type	Identifiers	Title	Dates	Format	Extra Information
Digitised copy	Series: S102 Record: R1577 Control Number: 1042/16 Representation: PR1638	KNOTT, JAMES MICHAEL	2016-02-01 - 2016-02-26	File/document	

Record Details

I only require pages related to the charges.

Status
Details
Digital Request Summary
Physical Request Summary
Form Actions

Physical Request Summary

View Fee Schedule

Items Requested

Issue Type	Identifiers	Title	Dates	Format	Extra Information
Original	Series: S102 Record: R1581 Control Number: 1047/16 Representation: PR1642	POOLE, COLETTE CHRISTINE	2016-02-01 - 2016-02-29	File/document	

Record Details

6. Save or submit the request as required.

4.5 Saving and submitting a request

Saving a request

File Issue request forms can be saved from the moment they are created to the moment they have been submitted to QSA.

Note: QSA will not have any visibility of requests saved by agency users until they are submitted.

To save a File Issue Request:

1. Scroll down to the bottom of the request form.

2. Click the 'save request' button.

3. A unique request number will be created with the prefix of FIR followed by the request number e.g. FIR383.

Submitting a request

When you are ready to submit a File Issue request to QSA:

1. Open the request

2. Scroll down to the bottom of the request form.

3. Click on the 'Submit File Issue Request' button.

Digital Request Summary

View Fee Schedule

Items Requested

Issue Type	Identifiers	Title	Dates	Format	Extra Information	
Digitised copy	Series: S102 Record: R1577 Control Number: 1042/16 Representation: PR1638	KNOTT, JAMES MICHAEL	2016-02-01 - 2016-02-26	File/document		⊖
	Record Details					

Status
Details
Digital Request Summary
Physical Request Summary
Form Actions
Comments/Discussion

Physical Request Summary

View Fee Schedule

Items Requested

Issue Type	Identifiers	Title	Dates	Format	Extra Information	
Original	Series: S102 Record: R1581 Control Number: 1047/16 Representation: PR1642	POOLE, COLETTE CHRISTINE	2016-02-01 - 2016-02-29	File/document		⊖
	Record Details					

SAVE REQUEST   DELETE REQUEST   SUBMIT FILE ISSUE REQUEST ➤

4.   This will send the File Issue request to QSA.

5 View and approve quotes

5.1 Understanding quotes

Quotes are issued at request/order level and are calculated based on what is requested and how many items or pages are required.

Digital quotes

Digital quotes are issued when a digital representation is required by your agency.

Quotes for scanning and digitisation include:

- a **retrieval fee** to retrieve the physical records from storage, calculated based on the number of items

- an **existing digital copy fee** if a digital copy of a restricted record already exists, calculated based on the number of items

- an additional '**urgent request fee**' charged per order IF the request has been marked as urgent in the request form.

- a **digitisation fee** to scan the requested pages, calculated based on the number of pages

Digitisation fees are broken down into 3 different page ranges:

- 1-20 pages – the fee to digitise up to 20 pages is per page. Each page is considered 1 unit.

- 21-50 pages – the fee to digitise 21-50 pages is based on the page range, not per page. Each 21-50-page group is 1 unit.

- 51-100 pages or more – the fee to digitise 51-100 pages is based on the page range, not per page. Each 51-100-page group is 1 unit.

If a request contains more than 100 pages, multiple units will be applied to the page ranges above to cover all requested pages.

Examples:

No. of items retrieved	No. of pages to be scanned	Cost breakdown
2	30 pages	2 units of the retrieval fee (2 x $14.20) **plus** 1 unit of the '21-50 pages' fee ($59.85).
1	12 pages	1 unit of the retrieval fee ($14.20) **plus** 12 units of the '1-20-pages' fee (12 x $1.80)

No. of items retrieved	No. of pages to be scanned	Cost breakdown
5	119 pages	5 units of the retrieval fee (5 x $14.20) **plus** 1 unit of '51-100-pages' fee ($128.65) **plus** 19 units of '1-20 pages' fee (19 x $1.80).
9 Order is urgent	134 pages	9 units of the retrieval fee (9 x $14.20) **plus** 1 unit of '51-100 pages' fee ($128.65) **plus** 1 unit of '21-50 pages' fee **plus** 1 unit of the urgent order fee ($31.05)
1 Item already digitised	178 pages	1 unit of the existing digital item fee ($14.20)
17	289 pages	17 units of the retrieval fee (17 x $14.20) **plus** 3 units of the '51-100 pages' fee (3 x $128.65) **Note**: This example is shown in the screenshot below.

Digital Request Summary

View Fee Schedule

Quote

Unit Description	Unit Cost	No. of Units	Cost
Search fee	A$16.35 per 15min	0	A$0.00
Retrieval -- Standard	A$14.20 per record	17	A$241.40
Digital copy/scanning -- (1-20 pages; 300 ppi; up to A3 size; PDF)	A$1.80 per page	0	A$0.00
Digital copy/scanning -- (21-50 pages; 300 ppi; up to A3 size; PDF)	A$59.85 per order	0	A$0.00
Digital copy/scanning -- (51-100 pages; 300 ppi; up to A3 size; PDF)	A$128.65 per order	3	A$385.95
Existing digitised record -- (number of pages not relevant, retrieval fee waived)	A$14.20 per record	0	A$0.00
Additional fee for urgent scanning orders (Urgent status is if required before next delivery day)	A$31.05 per order	0	A$0.00
TOTAL			A$627.35

Issued: 2020-07-07

Physical quotes

Physical quotes are issued when the original (physical) representation is required within your agency.

If physical requests are marked as urgent you will also be charged an urgent fee.

Physical Request Summary

View Fee Schedule

Quote			
Unit Description	**Unit Cost**	**No. of Units**	**Cost**
Search fee	A$16.35 per 15min	0	A$0.00
Retrieval -- Standard	A$14.20 per record	6	A$85.20
Delivery -- Standard (Tues & Thur) (no fee for delivery to QSA Reading Room)	A$9.45 per order	0	A$0.00
Additional fee for urgent orders (Urgent status is if required before next delivery day)	A$31.75 per order	0	A$0.00
TOTAL			A$85.20

Issued: 2020-07-07

Note: Where representations are being picked up at QSA by your agency a delivery fee **will not** apply.

5.2 Pre-approve quotes

You have the option to pre-approve quotes before a File Issue request is submitted.

Pre-approving quotes is normally used for physical deliveries as the fees for retrieval and delivery are set fees.

Costs of digital requests will vary depending on the number of pages that require digitisation. It is more likely that quotes for digital deliveries will need to be approved after the costs have been calculated.

To **pre-approve quotes**, tick the 'Pre-approve Quotes?' checkbox in the File Issue request for before submitting the request.

This will mean that any quotes issued by QSA will automatically be approved, enabling the request to be approved by QSA.

If you **do not wish to pre-approve quotes**, make sure the 'Pre-approve Quotes?' checkbox is **not ticked** before submitting the request.

You will then need to approve these quotes before QSA can approve and process the request.

5.3 View quotes

When a quote has been issued by QSA, the status of the request, whether digital or physical or both, will be updated to 'QUOTE_PROVIDED'.

To view the quote/s:

1. Navigate to the 'My File Issue' tab and then the 'Request tab'.

2. Find the request in question.

3. Click view to open the request.

4. Scroll down to the Request summary for Digital or Physical requests.

Approve quotes

To approve the quote/s:

5. Click the 'Accept Quote' button for each Request Summary (Digital or Physical).

6. A window will appear asking 'Are you sure you want to accept this quote?'

7. Click 'confirm' on the warning to accept the quote.

8. Once the 'confirm' button has been clicked, the status of the request whether digital or physical will update to 'QUOTE_ACCEPTED'.

Amending requests at quote stage

You can amend a request if required until a quote has been accepted (e.g. remove representations from a request).

If you amend a request after a quote has been provided, you will be asked to confirm the changes and that you understand the provided quote is no longer valid.

Please use the comments/discussion feature to notify QSA that the request has been amended and a new quote is required.
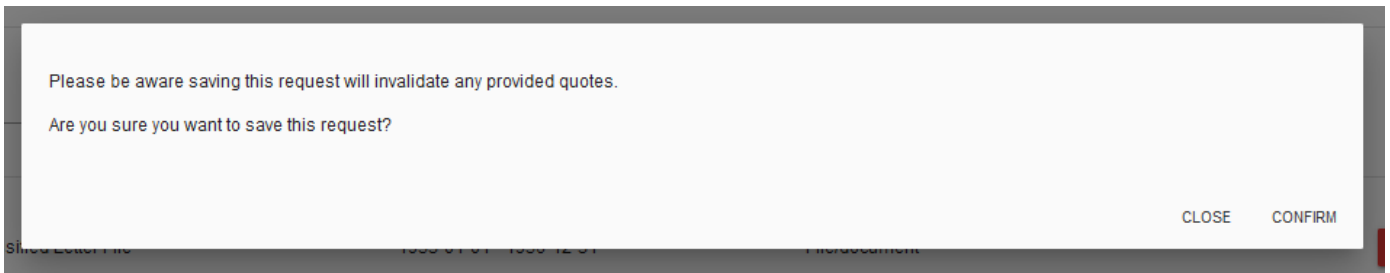
Once a request has been amended, an update quote will need to be provided by QSA and then accepted by you before the request can be approved and the representations delivered.

Declining a quote

If you do not want to approve the quote/s, you need to cancel the request. This can be done for either the physical or digital parts of the request, or the entire request.

If a request is cancelled, you will not be able to see the quote information in the File Issue request.

If you cancel a part of a request once a quote has been provided, the quote for it does not appear in the invoice even if the other part has been fulfilled and invoiced.

To cancel a request at the quote stage:

1. Scroll down to the quote section for the request.

2. Click on the 'Cancel request' button under the part you want to cancel (for part of a request) OR at the bottom of the entire request (for an entire request).

3. A window will appear asking 'Are you sure you want to cancel this request'.

4. Click 'confirm' to cancel the request.

5. Once the 'confirm' button has been clicked, the status of the request whether digital or physical will update to 'CANCELLED_BY_AGENCY'.

6. Use the comments/discussion feature within the request to communicate with QSA about how you would like to proceed.

Note: Representations attached to the cancelled quote will remain on the request form. Cancelling the request in its entirety is the only way to remove representations after a quote has been cancelled.

6 Cancelling a request

You can cancel a request at any stage up until approval by QSA.

This can be done either on the File Issue requests homepage or within the request itself.

6.1 To cancel from the 'File Issue requests' home page:

1. Find the relevant request in the list on the homepage

2. Click 'cancel' on the right-hand side next to the request.

6.2 To cancel a request from the request details window:

1. Find the relevant request in the list on the homepage

2. Click 'view' to open the request

3. Scroll to the bottom of the page

4. Click on 'Cancel Request'.

6.3   Confirming a cancellation

Note: the requirement to confirm a cancellation is the same from both the File Issue homepage and from within the File Issue request.

3. A warning will appear asking, 'Are you sure you want to cancel this File Issue request?'.

4. To cancel the request, click 'confirm' on the warning.

Are you sure you want to cancel this request?

CLOSE   CONFIRM
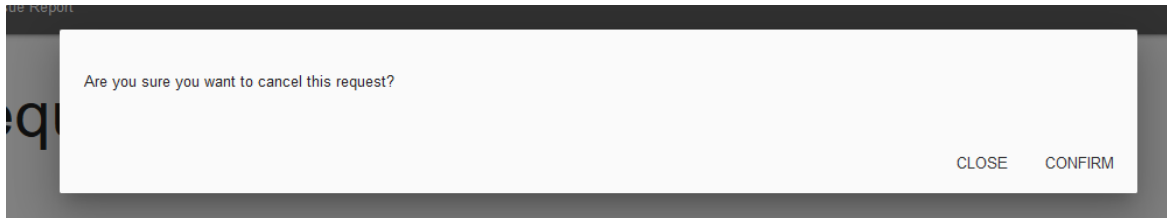
5. Once the 'confirm' button has been clicked, the status of the request will be updated to 'CANCELLED_BY_AGENCY'.

Note: Any requests cancelled by agencies will not be able to be resubmitted to QSA. Instead, a new request must be submitted.

File Issue Requests

CREATE REQUEST

Digital Request Status	Physical Request Status	Sort By
▼	▼	ID Z-A ▼

SEARCH REQUESTS   RESET

ID	Request Type	Urgent?	Digital Request Status	Physical Request Status	Created By	Date Created	
FIR108	Other	No	CANCELLED_BY_AGENCY	CANCELLED_BY_AGENCY	Test_User1	2020-07-02 11:39:11 +1000	VIEW
FIR106	Other	Yes	NONE_REQUESTED	FILE_ISSUE_CREATED	Test_User4	2020-07-02 11:25:12 +1000	VIEW
FIR105	Other	Yes	FILE_ISSUE_CREATED	FILE_ISSUE_CREATED	Test_User1	2020-07-02 11:25:00 +1000	VIEW
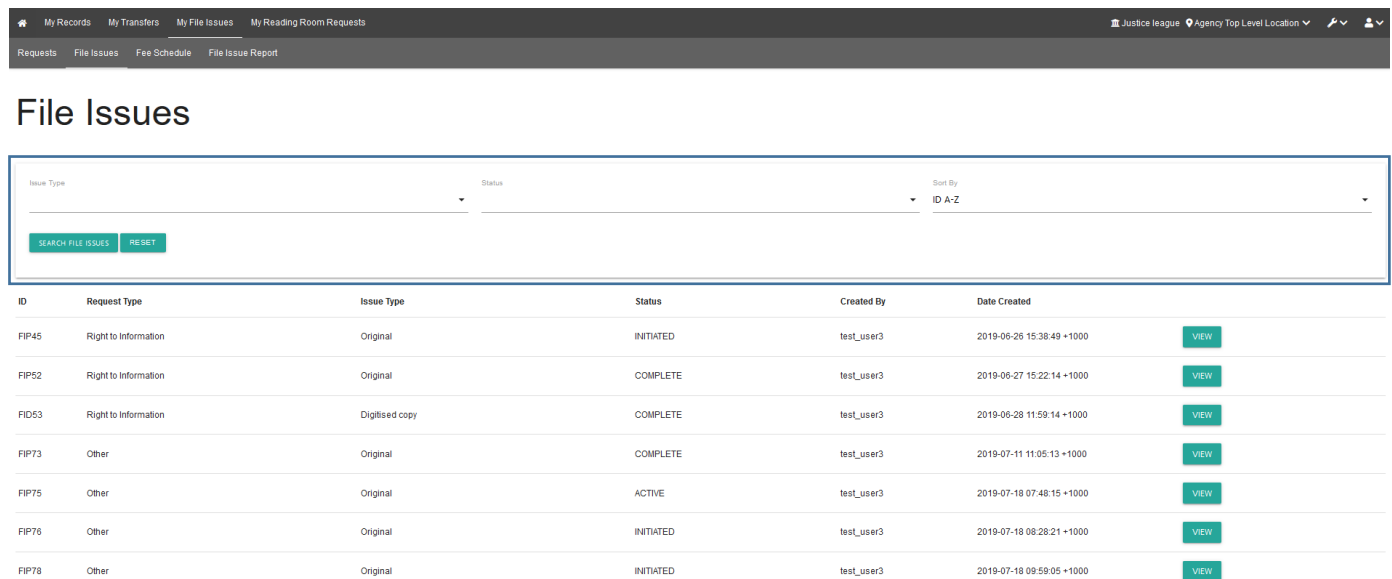
7   View and manage current File Issues

Once a File Issue request, whether digital, physical, or both, has been approved by QSA it becomes a File Issue Physical (FIP) and/or File Issue Digital (FID).

7.1   Filtering File Issues (physical and digital)

When you are in the File Issues page, under My File Issues in ArchivesGateway, you can filter the requests by Issue Type and Status.

There is also a 'sort by' section which provides a range of ways that you can sort the results.

7.2   Locating physical and digital File Issues

You can navigate to the File Issue Physicals (FIPs) or File Issue Digitals (FIDs) in two places:

- Within the File Issue Request (FIR)
- In the 'My File Issues' – 'File Issues' screen

To navigate to a FIP/FID within the File Issue Request

1. Navigate to the My File Issues
2. Click on the 'request' tab,
3. Scroll down or search for the appropriate request
4. Click 'view' to open and view the details
5. Scroll to the 'Digital Request Summary' and/or the 'Physical Request Summary'
6. Click on the 'view' button next to the FID/FIP ID. This will then open the FID/FIP.

Note: If you would like the request and FID/FIP open on two different webpages, right click on the view button and select 'Open Link in New Tap'.

Within 'File Issue' screen

To view a File Issue Physicals (FIPs) and/or File Issue Digitals (FIDs) in the 'File Issue' screen:

1. Navigate to the 'My File Issues'

2. Click on the 'File Issues' button along the top bar.

3. This will bring up a list of FIPs and FIDs created by QSA.

4. Scroll to or filter the list to find the FIP or FID required.

5. Click on the 'view' button.

7.3   File Issue status bar (FIPs/FIDs)

All File Issues will have a status bar showing the status of the File Issue.

The status bar is the same for both physical and digital File Issues.

The stages you will see in the status bar are as follows:

Status	Meaning
Request submitted & File Issue initiated	File Issue Request has been approved by QSA and a File Issue has been created, but not yet dispatched/uploaded.
File Dispatched / Uploaded & File Issue Active.	All or some of the Representations within a File Issue have been dispatched/uploaded.
Loan Returned/Closed & File Issue Complete.	All representations within a File Issue have been returned, had the link expire or have been closed off from the File Issue e.g. deaccessioned.

7.4   Migrated File Issues

File Issue requests created in QSA's previous archival management system (ArchivesOne) have been migrated into the new archival management system.

Migrated File Issues will display the word 'MIGRATOR" in the 'created by' column.

If you have more than 1 location for your agency, migrated File Issues can be seen in the agency top level location.

	My Records	My Transfers	My File Issues	My Reading Room Requests		🏛 Department of Justice and Att...	📍 Agency Top L

Requests   File Issues   Fee Schedule   File Issue Report

File Issues

Issue Type		Status		Sort By
	▾		▾	ID Z-A

[SEARCH FILE ISSUES] [RESET]

ID	Request Type	Issue Type	Status	Created By	Date Created	
FIP35880	Other - other	Original	ACTIVE	MIGRATOR	2020-05-12 10:00:00 +1000	[VIEW]
FIP35879	Other - other	Original	COMPLETE	MIGRATOR	2020-05-12 10:00:00 +1000	[VIEW]
FIP35864	Other - other	Original	ACTIVE	MIGRATOR	2020-05-07 10:00:00 +1000	[VIEW]
FIP35847	Other - other	Original	ACTIVE	MIGRATOR	2020-05-05 10:00:00 +1000	[VIEW]
FIP35844	Other - other	Original	COMPLETE	MIGRATOR	2020-05-01 10:00:00 +1000	[VIEW]
FIP35841	Other - other	Original	COMPLETE	MIGRATOR	2020-05-01 10:00:00 +1000	[VIEW]
FIP35834	Other - other	Original	ACTIVE	MIGRATOR	2020-04-29 10:00:00 +1000	[VIEW]

7.5 File Issue Physical (FIPs)

File Issue label

All physical File Issues will have a details and delivery label on the back for each representation. The delivery packaging also has the same label.

This label can be used for identification purposes and includes the due date for return.

Other information on the label include;

- the File Issue Physical (FIP) ID,

- the physical representation (PR) ID,

- any previous system IDs,

- the agency control number of that physical representations,

- physical representation title,

- any information added to the records details field, and

- the requesting agency

QSA Due Date: 2020-09-14	
FIP: 35816 PR: 2605946 S6339-T6280-B170.00000	
PREV SYS: CONTROL NO: 8458/14	
CAMPBELL, IAN REID	
2014-09-08 - 2014-09-08	
Supreme Court of Queensland	

Dispatch and loan expiry

Once QSA dispatches a physical representation:

- The dispatch date will display in the 'Dispatch' column within a File Issue Physical (FIP) in ArchivesGateway.

- This will calculate a 'Loan Expiry' date, displayed in the 'Loan Expiry' column.

- This 'Loan Expiry' date is 90 days from the dispatch for File Issue Physicals (FIPs).

File Issue Rep ID	Series ID	Record ID	Title	Representation ID	Format	Processing/ Handling Notes	Dispatch	Loan Expiry	Returned	Overdue?
FIP35815-1621450	6339	1621450	Mohr, Leslie Joseph - Probate	1621450	File/document		2020-06-16	2020-09-14		No
FIP35815-1621448	6339	1621448	McCarthy, David John - Letters of Administration	1621448	File/document		2020-06-16	2020-09-14		No
FIP35815-1621451	6339	1621451	Englezakis, Theodora - Probate	1621451	File/document		2020-06-16	2020-09-14		No
FIP35815-1621453	6339	1621453	Little, August James - Probate	1621453	File/document		2020-06-16	2020-09-14		No
FIP35815-1621447	6339	1621447	Lloyd, Maria Ada - Reseal	1621447	File/document		2020-06-16	2020-09-14		No

Status
Items
Details
Comments/Discussion

Notifying QSA of returned records

To arrange the return of FIPs on loan:

1. Use the comments/discussion feature in the relevant File Issue Physical (FIP) request to notify QSA

2. Include details of when you wish to return physical representations requested via File Issue.

3. If you only wish to return **some** of the representations within a File Issue Physical (FIP), please specify which ones in your comment.

Comments/Discussion

Good afternoon File Issue,

We are ready to return all the representations within this File Issue.

Regards,

Theo Horsman

Theo_Horsman - 6/16/2020, 2:25:59 PM

[Type your message]

POST MESSAGE

Returned dates

After physical representations have been returned to QSA and marked as returned, the 'Returned' column of each representation within a File Issue Physical (FIP) in ArchivesGateway will display the date it was returned.

The returned date will only display for the physical representations that have been returned within a File Issue Physical.

If only **some** of the physical representations have been returned, the status of the File Issue Physical will remain as 'Files Dispatched/Uploaded' and 'File Issue Active'.

When **all** physical representations have been returned, the status of the File Issue Physical will change to 'Loan Returned/Closed' and 'File Issue Complete'.

VIEW REQUEST

File Issue Rep ID	Series ID	Record ID	Title	Representation ID	Format	Processing/ Handling Notes	Dispatch	Loan Expiry	Returned	Overdue?
FIP35815-1621450	6339	1621450	Mohr, Leslie Joseph - Probate	1621450	File/document		2020-06-16	2020-09-14	2020-09-01	No
FIP35815-1621448	6339	1621448	McCarthy, David John - Letters of Administration	1621448	File/document		2020-06-16	2020-09-14	2020-09-01	No
FIP35815-1621451	6339	1621451	Englezakis, Theodora - Probate	1621451	File/document		2020-06-16	2020-09-14	2020-09-01	No
FIP35815-1621453	6339	1621453	Little, August James - Probate	1621453	File/document		2020-06-16	2020-09-14	2020-09-01	No
FIP35815-1621447	6339	1621447	Lloyd, Maria Ada - Reseal	1621447	File/document		2020-06-16	2020-09-14	2020-09-01	No

Status
Items
Details
Comments/Discussion

Overdue records

If physical representations aren't returned before their loan expiry date, they will become overdue.

Overdue physical representations within a File Issue Physical (FIP) in ArchivesGateway can be identified by the 'red warning triangle' and the word 'yes' in the 'Overdue?' column.

File Issue Rep ID	Series ID	Record ID	Title	Representation ID	Format	Processing/ Handling Notes	Dispatch	Loan Expiry	Returned	Overdue?
FIP35815-1621450	6339	1621450	Mohr, Leslie Joseph - Probate	1621450	File/document		2020-03-17	2020-06-17		⚠ Yes
FIP35815-1621448	6339	1621448	McCarthy, David John - Letters of Administration	1621448	File/document		2020-03-17	2020-06-17		⚠ Yes
FIP35815-1621451	6339	1621451	Englezakis, Theodora - Probate	1621451	File/document		2020-03-17	2020-06-17		⚠ Yes
FIP35815-1621453	6339	1621453	Little, August James - Probate	1621453	File/document		2020-03-17	2020-06-17		⚠ Yes
FIP35815-1621447	6339	1621447	Lloyd, Maria Ada - Reseal	1621447	File/document		2020-03-17	2020-06-17		⚠ Yes

If physical representations within a File Issue Physical (FIP) become overdue, you will also get a warning on the welcome/notifications screen within ArchivesGateway.

Welcome

	Record	Notification	Time of Event	
	FIP32733	File Issue updated by hxnmkm	6/18/2020, 11:31:45.986	VIEW
	Role	ElizabethF_Harvey permissions updated to Department of Education (A... Agency Top Level Location	6/18/2020, 11:27:39.344	VIEW
	Role	Theo_Kreenan permissions updated to Department of Agriculture and Fisheries... Agency Top Level Location	6/18/2020, 11:23:43.344	VIEW
⚠	FIP35815	Has overdue items	6/17/2020	VIEW

Notifications

7.6 File Issue Digital (FIDs)

Uploaded digital representations and link expiry date

When QSA uploads the digital representations:

- the upload date will display in the 'Upload Date' column within a File Issue Digital (FID) in ArchivesGateway

- the 'Link Expiry Date' will be automatically calculated and will display in the 'Loan Expiry Date' column

- this 'Loan Expiry Date' date is **14 calendar days from the upload date** for File Issue Digital (FIDs)

After the 14 calendar days have passed, the **link to the digital representation will disappear**.

Once the link expires, the File issue will be marked as 'complete' in the status bar.
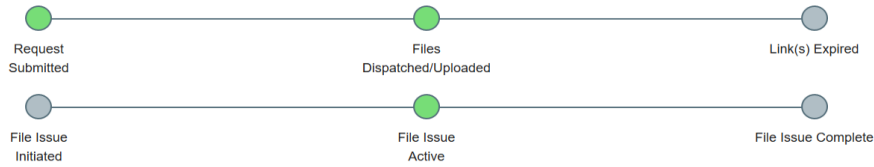
Downloading digital representations in ArchivesGateway

To download a digital representation in ArchivesGateway:

1. Navigate to the relevant FID in the File Issues tab.

2. Click 'view'.

3. Click the blue download button in the 'link to file' column.

4. A window will pop up asking whether you would like to open or save this file.

5. Save or open as required.

Note: It is up to each individual agency to decide if you view the file, or if you save a copy of the file for the next time it is required.

Records under a restricted access period

Digital representations under a restricted access period (RAP) or contain sensitive material will always be uploaded through a File Issue to ArchivesGateway.

Files must be downloaded within 14-days. After this period, the download link will expire and a new request must be submitted to access the record again.
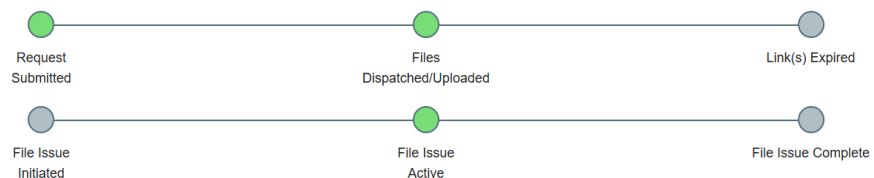
Open records and digital representations in ArchivesSearch

If the digital representations are open under a Restricted Access Period, and do not contain sensitive information, it will be added to the public catalogue, ArchivesSearch.

If you request a digitised copy of an open physical representation through the File Issue service, you will be provided as a link in a File Issue Digital to download it.

After the link expires, the digital representation attached to the Item will be accessible in ArchivesSearch.

Note: If a digital representation already exists and is attached to the Item in ArchivesSearch, you will be able to access that without completing a File Issue request.

See the ArchivesGateway user guide: Searching records and Search requests service for more information on how to access and download digital representations from ArchivesSearch.

8   Comments/discussion feature

The comments/discussion feature within ArchivesGateway can be used to communicate with QSA staff.

Note: This feature is also available in the Transfer Proposals/Transfers, Search Requests and Reading Room Request sections within ArchivesGateway.

To send a message to QSA regarding a File Issue requests or File Issues:

1. Scroll down to the bottom of the search request page to the comments/discussion section

2. Type in your message into the message field

3. Click 'post message'.

4. The message will appear above where the message was typed and QSA will be able to view this message within the relevant File Issue request or File Issue details window.

5. When QSA responds to your message, it will appear below your original message.

6. Use the message field as per steps above to respond to any comments posted by QSA.

9   File Issue reporting

Agency users with File Issue permissions can run File Issue Reports in ArchivesGateway.

To download File Issue reports:

1.   Click on the 'My File Issues' button

2.   Select 'File Issue Report'.

3.   Enter in the required dates for the report.

4.   When the necessary dates have been entered, click on 'Generate Report'.

5.   A window will appear with the options to open or save the file.

6.   Save or open as required.

Note: The report will download as a CSV file.

9.1   Information included in File Issue reports

File Issue reports downloaded from ArchivesGateway include information on:

- File Issue Requests (FIR)/File Issue Physical (FIP)/File Issue Digital (FID) ID,

- the representation title

- control number

- QSA identifier

- whether Physical Representation (PR) or Digital Representation (DR)

- loan expiry date

- returned date

- overdue status

- created by and location for each request

- number of physical/digital file issues created within that period.

ID	Representation Title	Control Number	QSA Identifier	Loan Expiry	Returned	Overdue?	Created By	Location
FIR302	ACKWORTH, Norman L (Cover Only) lease only		DR508				Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIR302	ABERCROMBIE, Roy B.; File/document	106	PR10044				Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIR303	SUHAN, VIDA KATHLEEN; File/document	10450/16	PR7678				Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIR303	CROSS, WILLIAM BENJAMIN; File/document	10451/16	PR7679				Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIR303	DENNY, CECILY MAY; File/document	10454/16	PR7680				Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIR303	PEARSALL, AILEEN FAY; File/document	10455/16	PR7681				Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIR303	SELLARS, JAMES SPURWAY; File/document	10456/16	PR7682				Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIR304	FORTNUM, PETER WILLIAM; File/document	10355/16	PR7612				Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIR304	THURECHT, SHERYLE MAREE; File/document	10357/16	PR7613				Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIR304	SMITH, SUSAN KELLY GAY; File/document	10358/16	PR7614				Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIR304	MOXLY, RAYMOND STEPHEN SUTTON; File/document	10359/16	PR7615				Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIP178	ABERCROMBIE, Roy B.; File/document	106	PR10044	02/04/2020	04/01/2020	FALSE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FID179	ACKWORTH, Norman L (Cover Only) lease only		DR508	17/01/2020		TRUE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIP180	SUHAN, VIDA KATHLEEN; File/document	10450/16	PR7678	02/04/2020	06/01/2020	FALSE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIP180	CROSS, WILLIAM BENJAMIN; File/document	10451/16	PR7679	02/04/2020	04/01/2020	FALSE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIP180	DENNY, CECILY MAY; File/document	10454/16	PR7680	02/04/2020	04/01/2020	FALSE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIP180	PEARSALL, AILEEN FAY; File/document	10455/16	PR7681	02/04/2020	04/01/2020	FALSE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIP180	SELLARS, JAMES SPURWAY; File/document	10456/16	PR7682	02/04/2020	04/01/2020	FALSE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIP181	FORTNUM, PETER WILLIAM; File/document	10355/16	PR7612	02/04/2020		TRUE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIP181	THURECHT, SHERYLE MAREE; File/document	10357/16	PR7613	02/04/2020		TRUE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIP181	SMITH, SUSAN KELLY GAY; File/document	10358/16	PR7614	02/04/2020		TRUE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIP181	MOXLY, RAYMOND STEPHEN SUTTON; File/document	10359/16	PR7615	02/04/2020		TRUE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIP184	GADSBY, JOAN DENHOLM; File/document	10270/16	PR7545			FALSE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIP185	MCALARY, MARY BRIDGET; File/document	10278/16	PR7552			FALSE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIP195	CLARK, F.A.; File/document	5	PR10344			FALSE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FID204	Toshiba, Jam		DR79	06/03/2020		TRUE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIP218	SCUDERI, CARMELA; File/document	Aug-16	PR1355	03/06/2020	06/03/2020	FALSE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIP218	BARBER, MARGARET ETHEL; File/document	Sep-16	PR1356	03/06/2020	06/03/2020	FALSE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIP218	GOODSIR, DAVID STEWART; File/document	Nov-16	PR1357	03/06/2020	06/03/2020	FALSE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIP218	STONEBRIDGE, NORMAN; File/document	Dec-16	PR1358	03/06/2020	06/03/2020	FALSE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIP218	COWARD, CHERRIE WATTLE; File/document	13/16	PR1359	03/06/2020	06/03/2020	FALSE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FIP218	BERG, BETTY ELAINE; File/document	15/16	PR1360	03/06/2020	06/03/2020	FALSE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FID219	CUNNING, DOREEN ADA ELIZABETH		DR228	19/03/2020		TRUE	Test_Transfer3 (Not yet provided)	Agency Top Level Location
FID219	AITKEN, Douglas Robert - summary		DR471	19/03/2020		TRUE	Test_Transfer3 (Not yet provided)	Agency Top Level Location

10 More information

Further information is available on the Recordkeeping section of the For Gov website:

- [Use ArchivesGateway](#)

- [Transfer records to QSA](#)

- [Restrict access to records at QSA (Restricted Access Periods)](#)

- [Retrieve or access your agency's records at QSA (File Issue service)](#)

- [Provide access to closed records](#)

Other user guides are also available for specific functions within ArchivesGateway and are available on the relevant pages listed above.

If you require further assistance with ArchivesGateway, please contact the ArchivesGateway team via email: ArchivesGateway@archives.qld.gov.au.