



TRIM9
Content Manager

Tips & Tricks

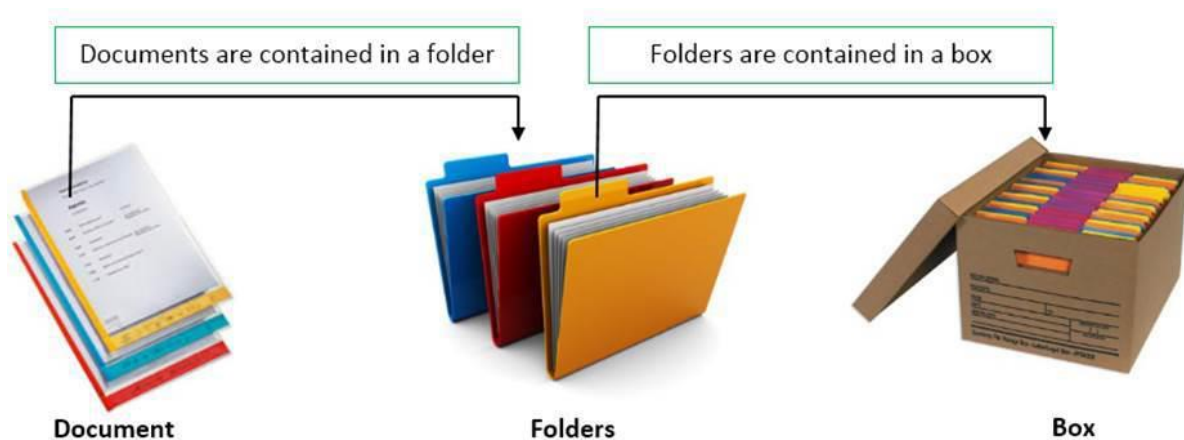
Record Types

Do you understand record types?

Utilising record types effectively can improve your searching and registration!

Record types are the basic building blocks or templates for your records. Record Types can behave as:

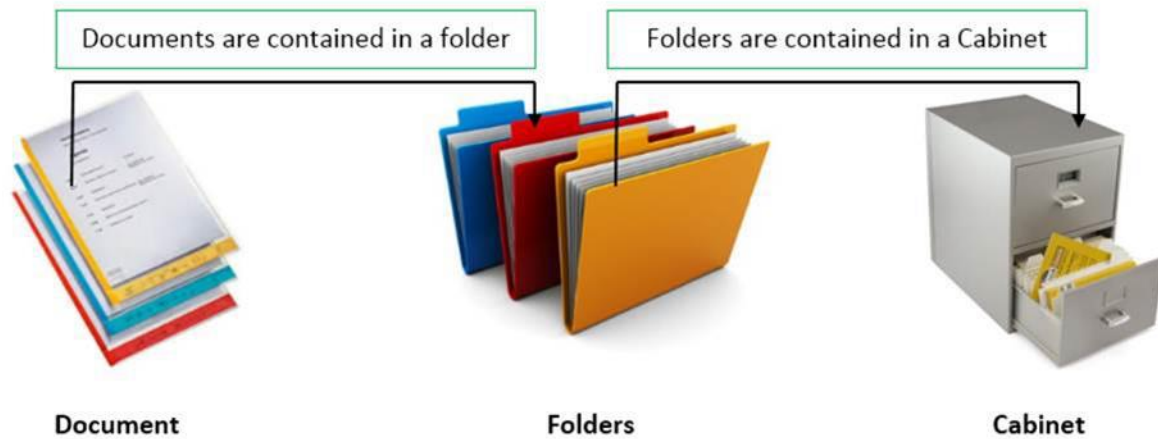
- | | | |
|------------------------------|---|--|
| Documents | - | Individual documents |
| Folders / Sub-Folders | - | Container for the documents |
| Boxes | - | Container for physical folders, usually for archival purpose |



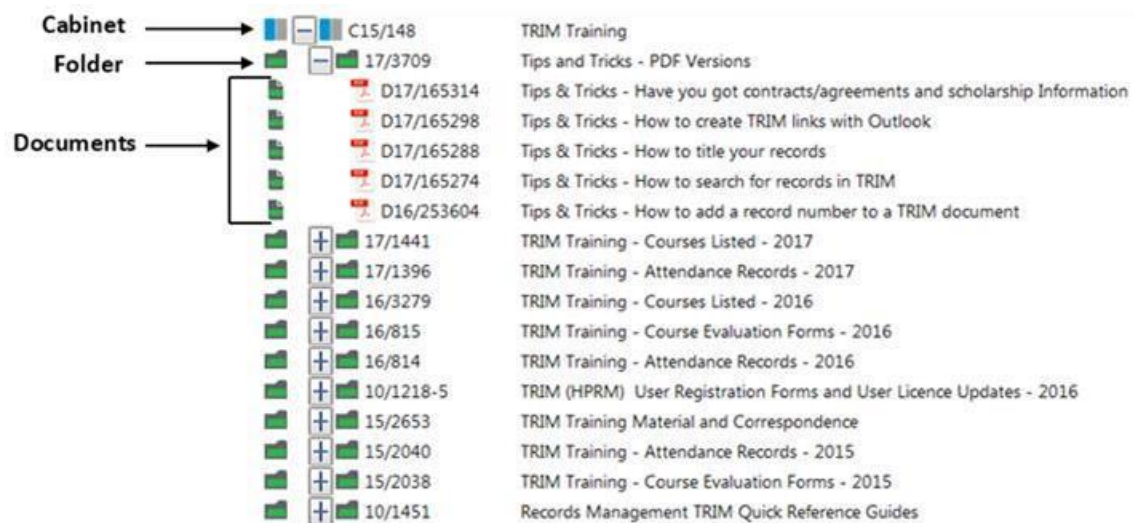
In some cases, large folders can have sub-folders, in which case documents can be contained in folders or sub-folders.



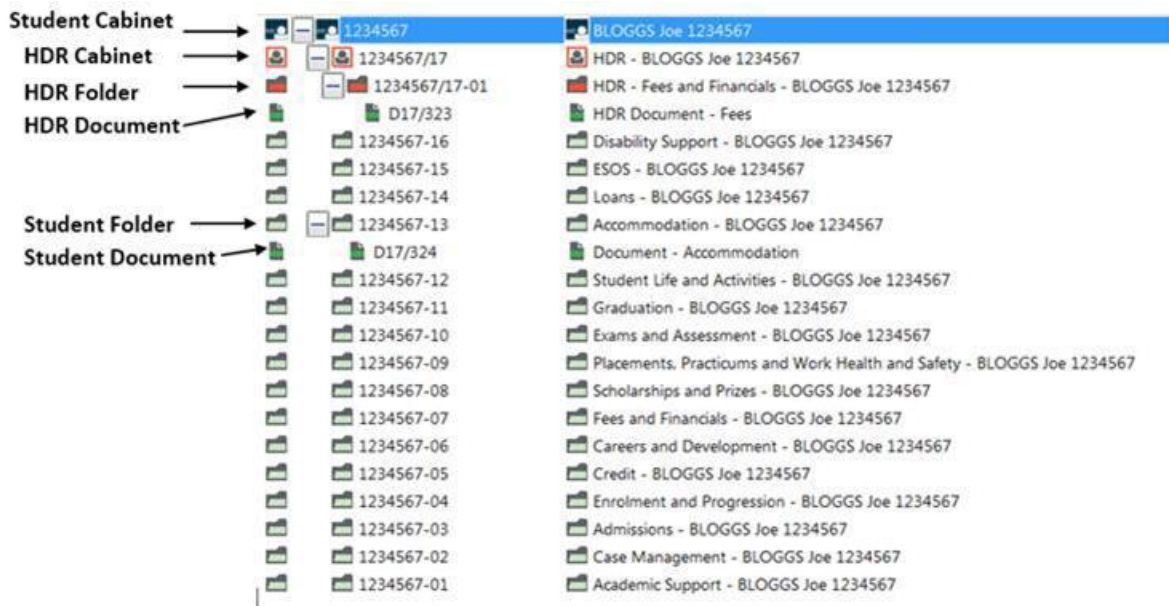
For Electronic records, UoN also uses “cabinets” to group similar records – similar to using a physical filing cabinet to hold physical folders.



Within TRIM this structure would appear as below:



















Student cabinets and folders are similar in structure, however the cabinet groups all information relating to one student. If the student is a HDR student they will also have a HDR cabinet within their Student cabinet for HDR records.













Currently UoN has 68 different record types. The range of record types visible to users will be dependent on their access profiles. The following features distinguish record types:

- Icon (shape and colour)
- Numbering Pattern
- Access Requirements
- Metadata Collected

The most common record types are outlined below:

Icon	Record Type Name	Numbering	Used for	Notes
	Electronic Cabinet - Level 1	C23/1	General administrative cabinet to organise similar folders	
	Electronic Cabinet - Level 2	C23/1/1	Sub-cabinet for Electronic Cabinet – Level 1	
	Electronic Cabinet - Level 3	C23/1/1/1	Sub-cabinet for Electronic Cabinet – Level 2	
	Electronic Cabinet - Level 4	C23/1/1/1/1	Sub-cabinet for Electronic Cabinet – Level 3	
	Electronic Folder	23/1	General administrative / business files	
	Electronic Folder – Level 1	23/1/1	Subfolder for Electronic Folder	
	Electronic Folder – Level 2	23/1/1/1	Subfolder for Electronic Folder – Level 1	
	Electronic Folder – Level 3	23/1/1/1/1	Subfolder for Electronic Folder – Level 2	
	Electronic Folder – Level 4	23/1/1/1/1/1	Subfolder for Electronic Folder – Level 3	
	Electronic Document	D23/123456	For registration of all documents	
	Email	D23/123456	For registration of incoming/outgoing emails	
	File Note	D23/123456	For registration of File Notes	
	Audio	D23/123456	For registration of Audio Files	
	Video	D23/123456	For registration of Video Files	
	Image	D23/123456	For registration of Images (drawings, photographs etc)	
	Primary Student Cabinet	3058242	To group all folders relating to the same student	Automatically created by NuStar

	HDR Student Cabinet	3058242/16	To group all folders relating to the same HDR student (contained within Primary Student Cabinet)	Automatically created by NuStar
	HDR Electronic Student Folder	3058242/16-01	For HDR Student Documents (contained within HDR Student Cabinet)	Automatically created by NuStar
	Electronic Student Folder	3058242-01	For Student Documents (contained within Primary Student Cabinet)	Automatically created by NuStar
	Investigation	SMI257/23	For records relating to the investigation of student misconduct	Used by Student Academic Conduct Officers (SACOs)
	Student Misconduct	SMR281/23	For recording the outcome of an investigation of student misconduct	Used by Student Academic Conduct Officers (SACOs)
	Electronic Policy Document	D23/123456	For registration of policies	
	Physical RGS Administrative File	2023/1234	For physical administrative files	Used by Cultural Collections and Records Governance Services
	Physical Student File	3058242	For physical student files (prior to electronic cabinets)	
	Physical Local Administrative File	LAD2009/288	For physical files created by faculties, school and other units	
	Archive or Storage Box	B2017/347	For physical boxes used to store physical files/folders	Used by Records Governance Services

