

# CREATING CABINETS, FOLDERS (FILES) AND SUB-FOLDERS IN THE TRIM WEB CLIENT

## Cabinets, Folders (Files) and Sub-Folders

Cabinets, Folders (Files) and Sub-Folders are all referred to as **Containers** as they can contain other records.

**Cabinet** : The purpose of a Cabinet is to group together Folders with similar subject matter. They can also be used to create a hierarchical file structure for a Faculty, School, Team etc., like that of a share drive structure. Only Folders and lower level Cabinets can be contained directly within a Cabinet (I.e. no sub-folders, no emails, no Word documents etc.)

**Folders** : Folders are the level at which Records Governance compliance is achieved. For this reason, there is often fields on the Record Entry Form for Folders that require you to select an appropriate classification and security/access controls based on the information to be housed in the folder. Folders can contain Sub-Folders, Documents, Emails, Photos etc.

**Sub-Folders** : Sub-Folders (Electronic Folder Level 1, Electronic Folder Level 2 etc.) can be used inside of Folders to sort and organise documents, particularly when the Folder contains many documents. Sub-Folders can contain lower-level Sub-Folders, Documents, Emails, Photos etc.

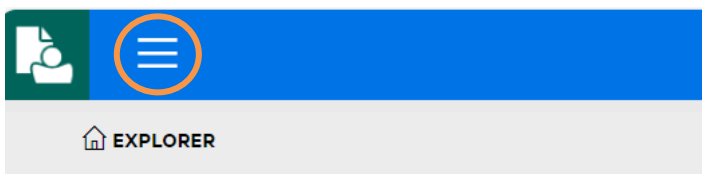
Creating Cabinets and Sub-Folders is generally more straightforward than creating Folders, as Folders generally have more fields to complete, and as mentioned above, Folders will generally also require you to select an appropriate classification and security/access controls.

**Note:** Before creating a Container, it is a good idea to conduct a search of TRIM to ensure a Container of the same or similar name which will meet your requirements doesn't already exist.

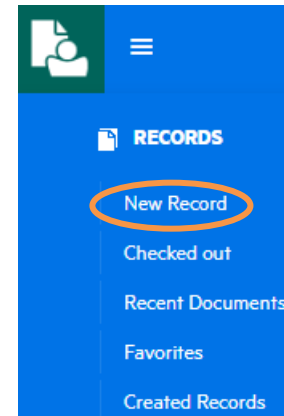
## Creating Stand-Alone Containers

If you would like to create a Cabinet or Folder that **does not** reside inside another Container:

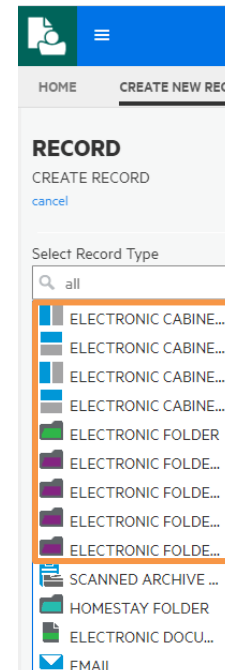
1. Click on the **Menu** button:



2. Select **New Record**:



3. Select the Container Record Type you would like to create by clicking on it once:



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- The **Record Entry Form** for your selected Container Record Type will appear on screen. Any field with red asterisk (\*) at the end of its title is a mandatory field:

GENERAL

Title (Free Text Part) \*

NOTES

**SAVE** **CANCEL**

### Mandatory Fields

- Mandatory fields must be completed before you can save your new Container. If you don't complete a mandatory field, you will be prompted to do so:

Title (Free Text Part) \*

❖ A value must be entered for the field 'Title (Free Text Part)'.

### Classification

- If the **Record Entry Form** has a field titled 'Classification', below are instructions on how to complete this field. If not, please move forward to [Step 7](#):

The purpose of the 'Classification' field is to categorise the folder so we know what information is housed within the folder, and how long it must be retained for to meet legislative requirements. Should you require assistance with selecting the correct classification for your folder, or be interested in training on using the 'Classification' field; please contact Records Governance Services on 492 15306 or [records@newcastle.edu.au](mailto:records@newcastle.edu.au)

- Click in the 'Classification' field:

Classification \*

< Enter Search Query >

- Top Level Classifications will appear. Scroll through the list of Top Level Classifications to find the most appropriate for the folder you are creating, then click on the **See more Arrow** for that Top Level Classification to see the second level options for that Classification:

Classification \*

top

- 5:ASSESSMENT >
- 8:AUDIT >
- 53:COMMERCIAL OPERATIONS >
- 13:COMMUNITY RELATIONS >
- 10:COMPENSATION >
- 56:COMPLAINTS MANAGEMENT >
- 14:COMPLIANCE >
- 15:CONTRACT MANAGEMENT >
- 16:CURRICULUM MANAGEMENT >
- 130:ELICOS Sydney >
- 20:EQUIPMENT & STORES >

**Note:** You can't attach a Top Level Classification to a Folder.

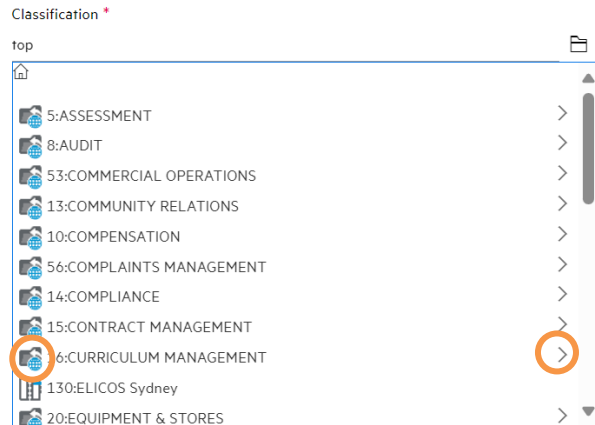
**Hint:** Whilst browsing the Classifications, the **House** icon can be used at any time to navigate back to the Top Level Classifications.

# CREATING CABINETS, FOLDERS (FILES) AND SUB-FOLDERS IN THE TRIM WEB CLIENT

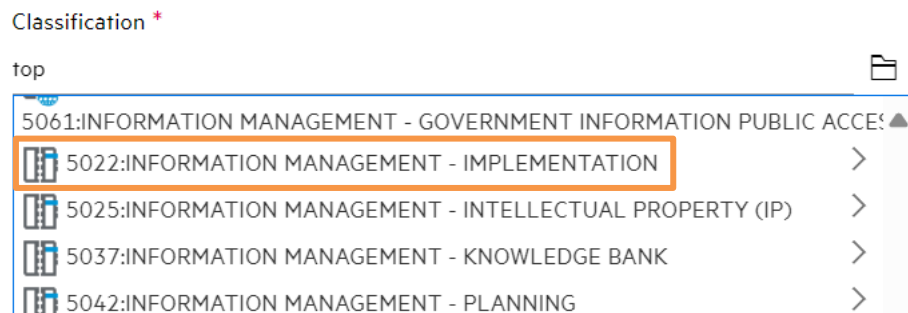
- c. The Second Level Classifications for your chosen Classification will appear. Only Classifications with the below icon can be attached to a Folder:



For some Classifications it is possible that some of its Second Level Classifications are not able to be attached to a Folder. Should you encounter this, you will need to click on the **See more Arrow** again to see the third level options for that Classification:



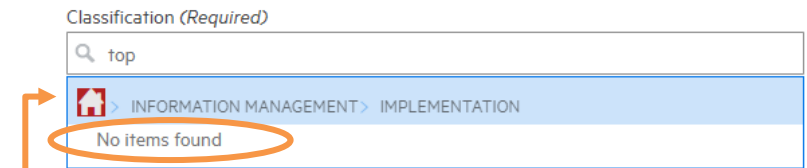
- d. When you have located the correct Classification, click on it once to select it:



- e. Your selected Classification will now be populated in the 'Classification' field:



**Note:** Should you click the **See more Arrow** for a Classification which doesn't have any lower-level options, a 'No items found' message will be populated in the 'Classification' field as shown below:



Should this happen, click the **House** icon to navigate back to the Top Level Classifications and start again.

### Title

- 7. Complete the 'Title' field in line with any local naming guidelines or general UON titling guidance in the TRIM guide titled 'Quick Reference Guide – TRIM Record Titling'.

### Security

- 8. If the **Record Entry Form** has a field titled 'Security', below are instructions on how to complete this field. If not, please move forward to [Step 9](#):

By default the 'Security' field should be populated with **Staff in Confidence**. Generally, this should be sufficient, as Access Controls (discussed below) are primarily used at UON to control access to records in TRIM. However, if you are dealing with sensitive information which should have a higher Security Level on it, you can click the drop-down arrow and select the most suitable Security Level for the folder you are creating:

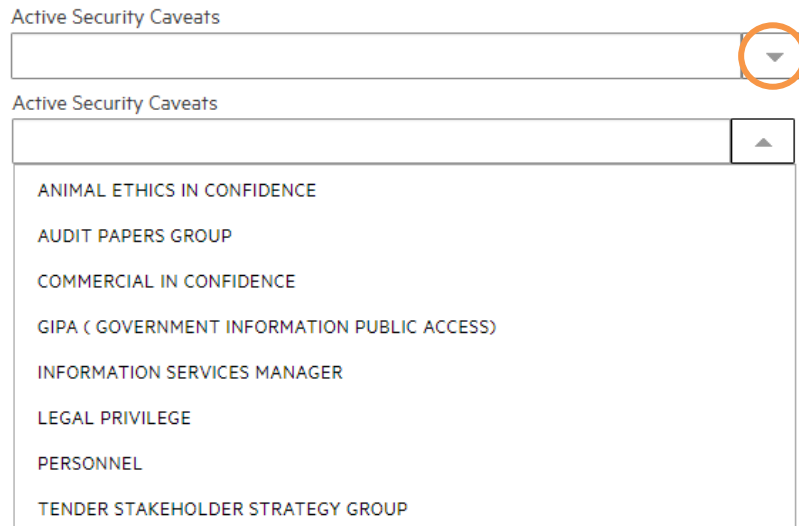


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## Security Caveats

9. If the **Record Entry Form** has a field titled 'Active Security Caveats', below are instructions on how to complete this field. If not, please move forward to [Step 10](#):

By default, the 'Active Security Caveats' field should be blank. Generally, this should be sufficient, as Access Controls (discussed below) are primarily used at UON to control access to records in TRIM. However, if you are dealing with information which requires a Security Caveat to be applied to it, this can be done by clicking the **drop-down** arrow for the 'Active Security Caveats' field and selecting the required Security Caveat from the list:



Active Security Caveats

Active Security Caveats

- ANIMAL ETHICS IN CONFIDENCE
- AUDIT PAPERS GROUP
- COMMERCIAL IN CONFIDENCE
- GIPA ( GOVERNMENT INFORMATION PUBLIC ACCESS)
- INFORMATION SERVICES MANAGER
- LEGAL PRIVILEGE
- PERSONNEL
- TENDER STAKEHOLDER STRATEGY GROUP

## Access Controls

If the **Record Entry Form** has a field titled 'Access Control', below are instructions on how to complete this field. If not, please move forward to [Step 11](#)

**Note:** The 'Access Control' field may be pre-populated for you depending on which Classification you chose in [Step 6](#). If so, you may move forward to [Step 11](#).

Access Controls are security controls which can be applied to control access to records within TRIM. Access can be granted or denied to users or groups of

users. This is particularly useful when the contents of a Folder are confidential and only a selected group of users should have permission to view the records.

Access Controls should be applied at the Folder level. It is generally easier to maintain Access Controls at the Folder level rather than the individual Document level, especially when the majority of Documents saved in a Folder will likely require the same Access Controls. Any records contained within a Folder that has Access Controls will automatically inherit the same access restrictions as the Folder.

Below is listed the seven available Access Controls, and an explanation of the purpose of each one:








Access Control	Purpose
<i>View Document</i>	Permits those listed to view the Folder and Documents within it – users must also have the "View Metadata" permission to view the Document.
<i>View Metadata</i>	Permits those listed to view the title and metadata of the Folder and its contents, but NOT actually open the Document and view it. Users must have the "View Document" permission to view any Documents inside the Folder.
<i>Update Document</i>	Permits users listed to make changes to the Folder or Documents within the Folder.
<i>Update Record Metadata</i>	Permits users listed to make changes to the record metadata.
<i>Modify Record Access</i>	Permits users listed to make changes to the security access controls on a record.
<i>Destroy Record</i>	Users are unable to destroy records so this can remain as <b>&lt;Unrestricted&gt;</b> .
<i>Contribute Contents</i>	Permits users listed to save documents inside the Folder.

**Note:** You have the option to customise all Web Client Access Controls at once or customise them one at a time. Instructions to do this are located on the following page:

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- a. Click the **drop-down arrow** for the Access Control you would like to customise **OR** tick the box next to **DETAILS** to select all Access Controls:

Access Control

<input type="checkbox"/> DETAILS	ACCESS
<input type="checkbox"/> View Document	<Unrestricted> 
<input type="checkbox"/> View Metadata	<Unrestricted> 
<input type="checkbox"/> Update Document	<Unrestricted> 
<input type="checkbox"/> Update Record Metadata	<Unrestricted> 
<input type="checkbox"/> Modify Record Access	<Unrestricted> 
<input type="checkbox"/> Destroy Record	<Unrestricted> 
<input type="checkbox"/> Contribute Contents	<Unrestricted> 

- b. Select **Custom**:


Public  
Private  
**Custom**  
No change

- c. The '**CUSTOMIZE ACCESS**' window will appear. Click in the 'Customize access' field where it says '<Enter Search Query>':

## CUSTOMIZE ACCESS

Select the Locations to grant access.

Customize access

 < Enter Search Query >


SAVE CANCEL


- d. Type in keywords from the Location you want to add to this Access Control. Any Locations which include the keywords you typed will display:





## CUSTOMIZE ACCESS

Select the Locations to grant access.

Customize access




 records governance




-  Manager Records Governance Services ➔
-  Records Governance Services (RGS) ➔
-  RGS Committee Box Storage (Records Governance Services - CH222A)
-  RGS Primary Storage (Records Governance Services - CH222A)

SAVE CANCEL

**Note:** When selecting Locations to grant access to, select:

- A Green **Organisation** Location  and/or
- A Green **Group** Location  and/or
- A Green **Position** Location 

**DO NOT** select a Person Location  because if that person transfers to a different Team, Unit, School, Faculty etc. it will likely be no longer appropriate for them to have access to that Folder.

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e. Select the **Location** to add to your Access Control by clicking on it once:

**CUSTOMIZE ACCESS**

Select the Locations to grant access.

Customize access

- Manager Records Governance Services
- Records Governance Services (RGS)**
- RGS Committee Box Storage (Records Governance Services - CH222A)
- RGS Primary Storage (Records Governance Services - CH222A)

SAVE CANCEL

**Hint:** If you would like to select one of the Locations which belong to one of the listed Locations (e.g. the Positions which belong to a Team) you can do this by clicking the **See more Arrow** for that Location:

- Manager Records Governance Services
- Records Governance Services (RGS)**
- RGS Committee Box Storage (Records Governance Services - CH222A)
- RGS Primary Storage (Records Governance Services - CH222A)

f. Your selected Location will now appear in the 'Customize Access' field. If customizing one at a time, you can repeat [Steps 10 c, d and e](#) above to add additional Locations should you need to. Select **SAVE** when you have added all required Locations:

**CUSTOMIZE ACCESS**

Select the Locations to grant access.

Customize access



SAVE CANCEL

g. Repeat [Steps 10 a to f](#) above for any additional Access Controls you would like to customise.

**Other Fields**

11. Complete any other mandatory (Required) fields, and any optional fields such as 'External ID' if relevant and used by your area/team.

**Hint:** Some fields may be pre-populated for you. E.g. If the fields 'Owner' and 'Assignee' are on your **Record Entry Form** they will be pre-populated.

12. Once all mandatory and relevant optional fields have been completed, select **SAVE** at the bottom of the **Record Entry Form** to create your new Folder:

SAVE CANCEL

The newly created folder will display on screen:

Query: 'creator:Me'

Showing 1 - 40 of 1514 Count

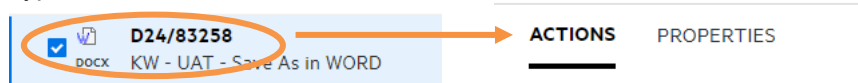
- 20/550  
INFORMATION MANAGEMENT - IMPLEMENTATION - Test Folder

*For instructions on creating a Container inside of another Container please refer to the next page.*

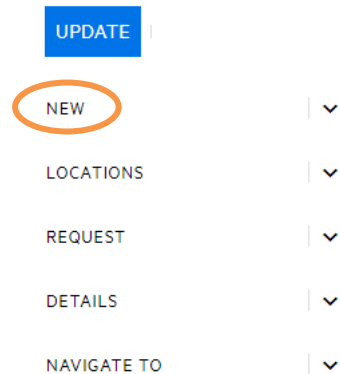
### Creating a Container Inside Another Container

To create a Folder that resides inside a Cabinet, or a Sub-Folder which resides within a Folder etc.

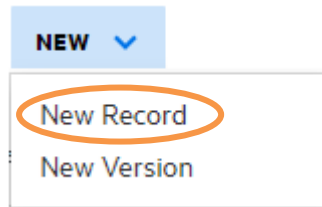
1. Locate the Container which you want to create another Container within.
2. Ensure the options for the Container such as ACTIONS, PROPERTIES, UPDATE etc. are displayed on the right-hand side of your screen. If not, click on the record number once to display them or tick the box next to Record Type:



3. Click on the **NEW** drop-down:



4. Select **New Record**:



5. From here the process is the same as the instructions provided in the 'Creating Stand-Alone Containers' section at the start of this guide. Follow [Steps 3 through 12](#) in the 'Creating Stand-Alone Containers' section to finish creating your new Container inside another Container.