

## Moving Records from one Container to Another






The term 'container' in TRIM9 is used to describe a record type which can contain a record inside of it. Typically, this would be a folder which contains a document; however in TRIM9 at UON there are many different folder record types, as well as sub-folder record types and cabinet record types which can all contain other records. Hence, the term 'container' is used to broadly refer to them all.

Typically, when moving a record from one container to another you would be moving a document or email from one folder or sub-folder to another folder or sub-folder. However, it is also possible to move a sub-folder from one folder to another, or to move a folder from one cabinet to another etc.

To move a record from one container to another:

1. Locate the record which you want to move.
2. Ensure the options for the record such as UPDATE, NEW, LOCATIONS etc. are displayed. If not, click on the record number once to display them:






DOCX **D20/34427**  
Example Document - TRIM9 Quick Reference Guide Creation

**UPDATE** NEW   LOCATIONS  REQUEST  DETAILS 

ASSIGNEE  
In container '20/493 (Records Governance Services (RGS))' since Tuesday, April 7, 2020 at 4:17 PM

3. Click the **UPDATE** button:

DOCX **D20/34427**  
Example Document - TRIM9 Quick Reference Guide Creation

**UPDATE** NEW   LOCATIONS  REQUEST  DETAILS 

ASSIGNEE  
In container '20/493 (Records Governance Services (RGS))' since Tuesday, April 7, 2020 at 4:17 PM

4. The Record Entry Form for that record will display. Locate and click in the 'Container' field:

**Hint:** The 'Container' field will appear in different spots on the Record Entry Form depending on which record type you are working with.

### GENERAL

Title (Free Text Part) (Required)

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Container (Required)

 20/493


Date Written (Created) (Required)

20/03/2019 2:21 PM

External ID

☐ Physical Original Executed Agreement Received

Alternative container

 < Enter Search Query >

☒ Enclosed?

NOTES

**SAVE**

**CANCEL**

- When you click in the 'Container' field a **KwikSelect** button will appear at the end of the field. Click on the **KwikSelect** button:








Container (Required)

- The 'PLEASE SELECT A VALUE FOR 'CONTAINER'' field will display. By default, a list of your recently used containers will be available on screen for you to select from:

## PLEASE SELECT A VALUE FOR 'CONTAINER'

Showing 1 - 23 of 23








<input type="checkbox"/>		C18/47/1/3	HDR Candidature Variation Sup...
<input type="checkbox"/>	+		20/540-1 INFORMATION MANAGEMENT ...
<input type="checkbox"/>		20/523/1	Test Web Client Sub-Folder - Bry...
<input type="checkbox"/>	+		20/523 STRATEGIC MANAGEMENT - M...
<input type="checkbox"/>	+		20/517 INFORMATION MANAGEMENT ...
<input type="checkbox"/>	+		20/516 INFORMATION MANAGEMENT ...
<input type="checkbox"/>	+		12345678/01-01/1 Application for Admission - BAY...

OK CANCEL

- If one of the containers on screen happens to be the container you need to move the record to, select it by clicking the checkbox to place a tick in it, then select **OK**. You can then skip forward to [Step 11](#) in this guide:

## PLEASE SELECT A VALUE FOR 'CONTAINER'

Showing 1 - 23 of 23

<input type="checkbox"/>		C18/47/1/3	HDR Candidature Variation Sup...
<input type="checkbox"/>	+		20/540-1 INFORMATION MANAGEMENT ...
<input type="checkbox"/>		20/523/1	Test Web Client Sub-Folder - Bry...
<input type="checkbox"/>	+		20/523 STRATEGIC MANAGEMENT - M...
<input type="checkbox"/>	+		20/517 INFORMATION MANAGEMENT ...
<input checked="" type="checkbox"/>	+		20/516 INFORMATION MANAGEMENT ...
<input type="checkbox"/>	+		12345678/01-01/1 Application for Admission - BAY...

8. If none of the containers on screen are the container you need to move the record to, click in the search box and delete the text 'myContainers'. The text in the search box will change to '<Enter Search Query>':

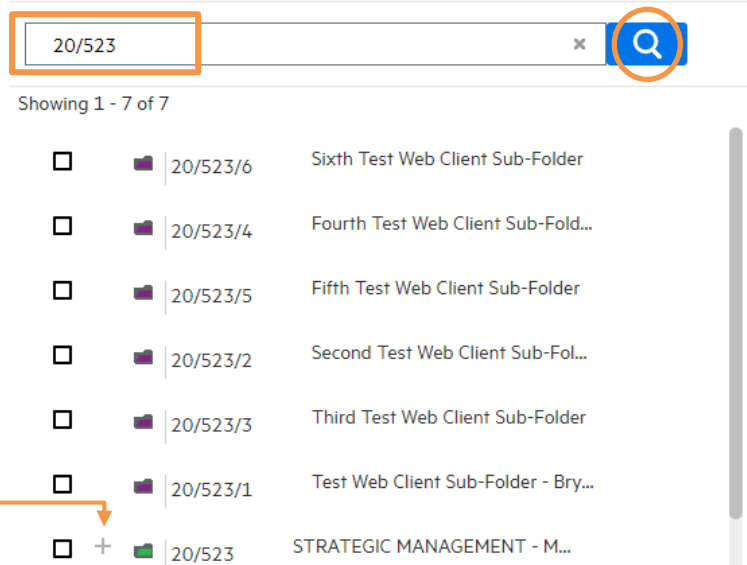


myContainers

< Enter Search Query >

9. Then type in either the record number of the container, or keywords from the title of the container you want to move the record to, then click on the **Search** button to show all the containers which match your search criteria:

**PLEASE SELECT A VALUE FOR 'CONTAINER'**



20/523

Showing 1 - 7 of 7

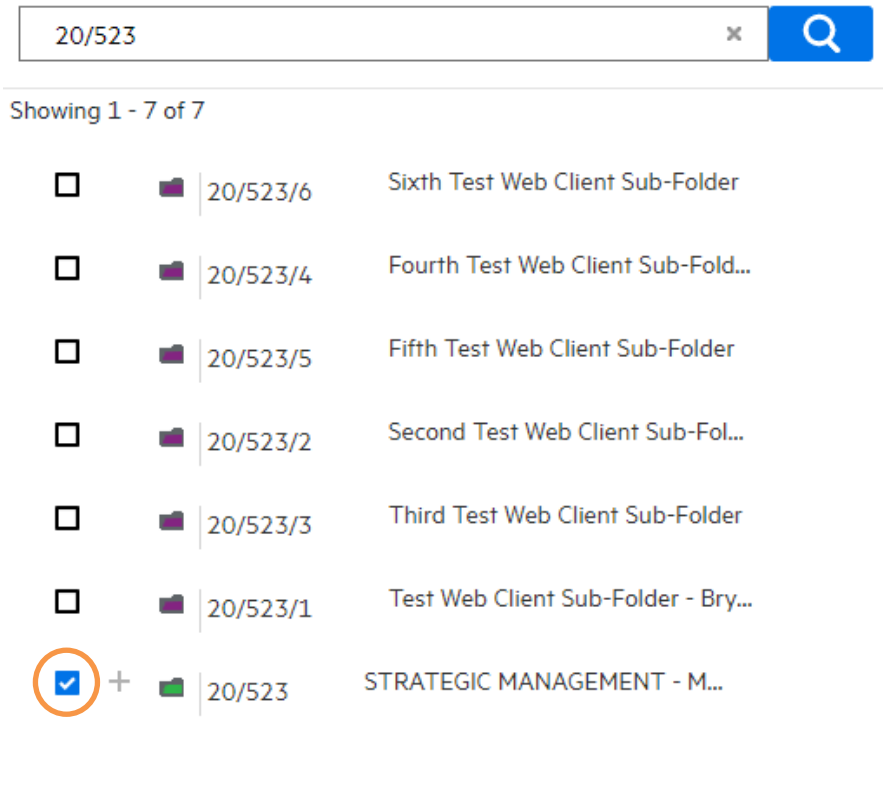
<input type="checkbox"/>	20/523/6	Sixth Test Web Client Sub-Folder
<input type="checkbox"/>	20/523/4	Fourth Test Web Client Sub-Fold...
<input type="checkbox"/>	20/523/5	Fifth Test Web Client Sub-Folder
<input type="checkbox"/>	20/523/2	Second Test Web Client Sub-Fol...
<input type="checkbox"/>	20/523/3	Third Test Web Client Sub-Folder
<input type="checkbox"/>	20/523/1	Test Web Client Sub-Folder - Bry...
<input type="checkbox"/>	20/523	STRATEGIC MANAGEMENT - M...

**Hint:** If you type in the record number of a container which has other containers inside it, as shown above TRIM9 will show the container which matches the record number you typed, plus any containers inside of it which have a record number based on that container.

**Hint:** For any container that has a + next to it, if you click the + you will see the contents of the container, which will then all be available to select.

10. Scroll through if necessary, to locate the container you want to move the record to, then select it by clicking the checkbox next to it to place a tick in it, then select **OK**.

**PLEASE SELECT A VALUE FOR 'CONTAINER'**



20/523

Showing 1 - 7 of 7

<input type="checkbox"/>	20/523/6	Sixth Test Web Client Sub-Folder
<input type="checkbox"/>	20/523/4	Fourth Test Web Client Sub-Fold...
<input type="checkbox"/>	20/523/5	Fifth Test Web Client Sub-Folder
<input type="checkbox"/>	20/523/2	Second Test Web Client Sub-Fol...
<input type="checkbox"/>	20/523/3	Third Test Web Client Sub-Folder
<input type="checkbox"/>	20/523/1	Test Web Client Sub-Folder - Bry...
<input checked="" type="checkbox"/>	20/523	STRATEGIC MANAGEMENT - M...

**OK** **CANCEL**

- The 'Container' field on the Record Entry Form will now be populated with the new container record number. Select **SAVE** to move the record to this new container:

## GENERAL

Title (Free Text Part) (Required)

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Container (Required)

20/523

Date Written (Created) (Required)

20/03/2019 2:21 PM

External ID

☐ Physical Original Executed Agreement Received

Alternative container

☒ Enclosed?

NOTES

**SAVE**

**CANCEL**

**Hint:** An alternative way to move a record from one container to another is to first ensure the options for the record such as UPDATE, NEW, LOCATIONS etc. are displayed. If not, click on the record number once to display them:

D20/34427

DOCX Example Document - TRIM9 Quick Reference Guide Creation

**UPDATE** NEW → ↻ ⬇ LOCATIONS ▼ REQUEST ▼ DETAILS ▼

ASSIGNEE

In container '20/493 (Records Governance Services (RGS))' since Tuesday, April 7, 2020 at 4:17 PM

- Then click on the **LOCATIONS** drop-down arrow and select **Container**:

D20/34427

DOCX Example Document - TRIM9 Quick Reference Guide Creation

**UPDATE** NEW ▼ → ↻ ⬇ **LOCATIONS** ▼ REQUEST ▼ DETAILS ▼

Container

Remove from Container REGISTERED

Set Assignee April 7, 2020 at 4:17 PM

Set Owner

Add Contact

Show Contacts

Remove Contacts

- The '**SET CONTAINER**' window will appear:

**SET CONTAINER**

'New container' cannot be left blank.

Set Container (Required)

20/493

☒ Enclose the record now

Note: Unchecking this box will not 'unenclose' any record. To 'unenclose' records 'set assignee'.

**SAVE** **CANCEL**

- Type in either the record number of the container, or keywords from the title of the container you want to move the record to, and all the containers which match your search criteria will appear. Select the container you want to move the record to by clicking on it once:

## SET CONTAINER

Set Container (Required)

20/523/6:Sixth Test Web Client Sub-Folder

20/523/4:Fourth Test Web Client Sub-Folder

20/523/5:Fifth Test Web Client Sub-Folder

20/523/2:Second Test Web Client Sub-Folder

20/523/3:Third Test Web Client Sub-Folder

20/523/1:Test Web Client Sub-Folder - Bryce - Update to Title

20/523:STRATEGIC MANAGEMENT - MEETINGS - Test Web Client Folder - ...

☒ Enclose the record now

Note: Unchecking this box will not 'unenclose' any record. To 'unenclose' records 'set assignee'.

SAVE

CANCEL

- Then select **SAVE**:

## SET CONTAINER

Set Container (Required)

20/523

☒ Enclose the record now

Note: Unchecking this box will not 'unenclose' any record. To 'unenclose' records 'set assignee'.

SAVE

CANCEL

**Note:** With this alternative method of moving a record from one container to another, you don't get the default list of your recently used containers display for you as they did in Step 6 and 7 above.