

## 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.

## Drag and Drop Method

The drag and drop method for moving records from one container to another is particularly simple if the record you want to move and the container you want to move it to are both on your screen at the same time. E.g. Moving a record in your Favorites to a different container which is also in your Favorites, or moving a record from a folder in a student cabinet to a different folder within the same student cabinet as in the screenshot below:

Record Number	Title
2345678	BAYGOH Winnie 2345678
2345678/01	HDR Cabinet - BAYGOH Winnie 2345678
2345678-16	ESOS - BAYGOH Winnie 2345678
2345678-15	Disability Support - BAYGOH Winnie 2345678
2345678-14	Loans - BAYGOH Winnie 2345678
D20/34802	Example Loan Document - BAYGOH Winnie 2345678
D20/34801	Example Fee Document - BAYGOH Winnie 2345678
2345678-13	Accommodation - BAYGOH Winnie 2345678
2345678-12	Student Life and Activities - BAYGOH Winnie 2345678
2345678-11	Graduation - BAYGOH Winnie 2345678
2345678-10	Exams and Assessment - BAYGOH Winnie 2345678
2345678-09	Placements, Practicums and Work Health and Safety - BAYGOH Winnie 2345678
2345678-08	Scholarships and Prizes - BAYGOH Winnie 2345678
2345678-07	Fees and Financials - BAYGOH Winnie 2345678
D20/24431	Example Financial Document - BAYGOH Winnie 2345678
2345678-06	Careers and Development - BAYGOH Winnie 2345678
2345678-05	Credit - BAYGOH Winnie 2345678

How to drag and drop a record from one container to another:

1. Simply click on the record you would like to move and (with the mouse button depressed) drag it to the container you want to move it to. Release the mouse button when your cursor is on the new container.

As an example, below I will drag and drop the document highlighted blue from the 'Loans' folder to the 'Fees and Financials' folder:

Record Number	Title
2345678	BAYGOH Winnie 2345678
2345678/01	HDR Cabinet - BAYGOH Winnie 2345678
2345678-16	ESOS - BAYGOH Winnie 2345678
2345678-15	Disability Support - BAYGOH Winnie 2345678
2345678-14	Loans - BAYGOH Winnie 2345678
D20/34802	Example Loan Document - BAYGOH Winnie 2345678
D20/34801	Example Fee Document - BAYGOH Winnie 2345678
2345678-13	Accommodation - BAYGOH Winnie 2345678
2345678-12	Student Life and Activities - BAYGOH Winnie 2345678
2345678-11	Graduation - BAYGOH Winnie 2345678
2345678-10	Exams and Assessment - BAYGOH Winnie 2345678
2345678-09	Placements, Practicums and Work Health and Safety - BAYGOH Winnie 2345678
2345678-08	Scholarships and Prizes - BAYGOH Winnie 2345678
2345678-07	Fees and Financials - BAYGOH Winnie 2345678
D20/24431	Example Financial Document - BAYGOH Winnie 2345678
2345678-06	Careers and Development - BAYGOH Winnie 2345678

2. When you drop the record on the new container, the 'Put Record in Container' window will appear. This window lists the 'Current container' that the record resides within, and the 'New container' that you are about to move the record to. Click **OK** to confirm the move:

Put Record in Container - 2345678-07

Current container  
In container '2345678-14' : Loans - BAYGOH Winnie 2345678 (Enclosed)

New container  
2345678-07: Fees and Financials - BAYGOH Winnie 2345678

☒ Enclose the record in the new container

OK Cancel Help

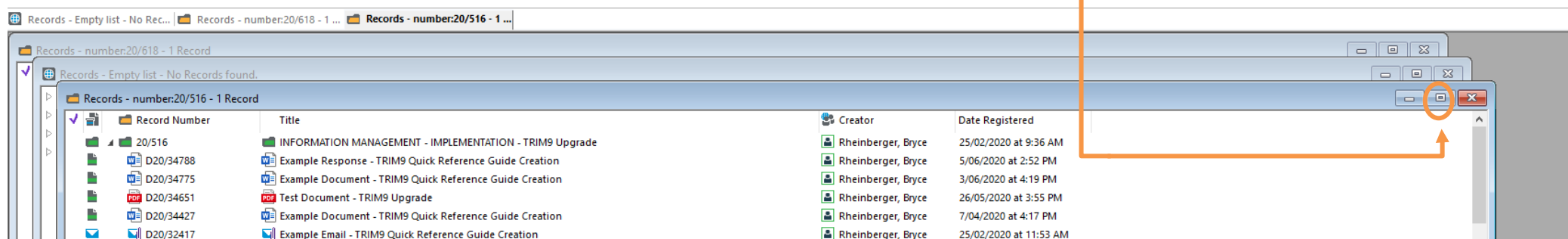
3. The record has now been moved to the new container:

Record Number	Title
2345678	BAYGOH Winnie 2345678
2345678/01	HDR Cabinet - BAYGOH Winnie 2345678
2345678-16	ESOS - BAYGOH Winnie 2345678
2345678-15	Disability Support - BAYGOH Winnie 2345678
2345678-14	Loans - BAYGOH Winnie 2345678
D20/34802	Example Loan Document - BAYGOH Winnie 2345678
2345678-13	Accommodation - BAYGOH Winnie 2345678
2345678-12	Student Life and Activities - BAYGOH Winnie 2345678
2345678-11	Graduation - BAYGOH Winnie 2345678
2345678-10	Exams and Assessment - BAYGOH Winnie 2345678
2345678-09	Placements, Practicums and Work Health and Safety - BAYGOH Winnie 2345678
2345678-08	Scholarships and Prizes - BAYGOH Winnie 2345678
2345678-07	Fees and Financials - BAYGOH Winnie 2345678
D20/34801	Example Fee Document - BAYGOH Winnie 2345678
D20/24431	Example Financial Document - BAYGOH Winnie 2345678
2345678-06	Careers and Development - BAYGOH Winnie 2345678

## Drag and Drop Method – Advanced

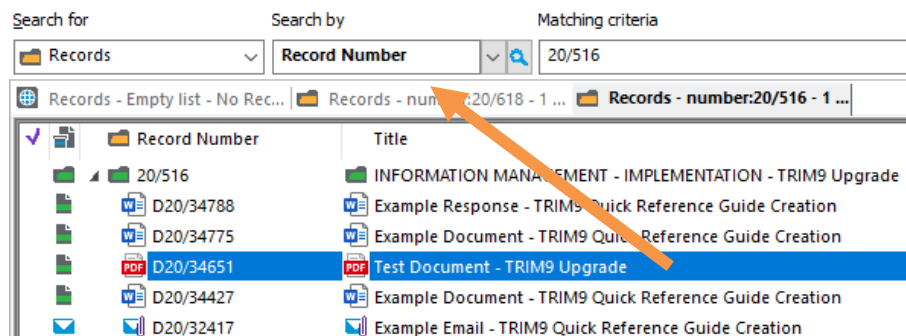
Sometimes the record you want to move and the container you want to move it to won't be on your screen at the same time. On these occasions, you can still drag and drop a record from one container to another by using the **Tab Bar**.

**Hint:** if your TRIM9 windows are cascaded so you see one behind the other (as in the screenshot below), for this advanced drag and drop method to work best it is recommended to maximise your TRIM9 windows by clicking the **Maximize** button on your current window:

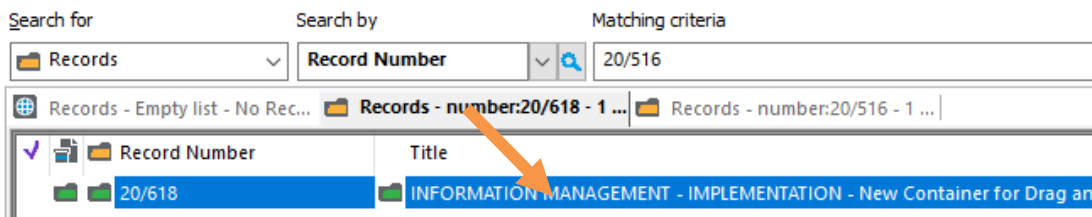


How to drag and drop a record from one container to another using the **Tab Bar**:

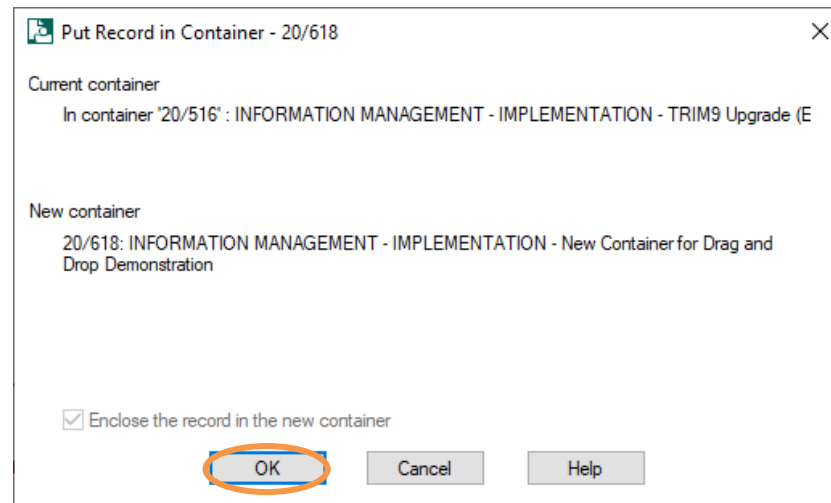
1. Search for the new container that you want to move the record to.
2. Search for the record that you want to move.
3. Click on the record you would like to move and (with the mouse button depressed) drag it to the previous tab in the Tab Bar:



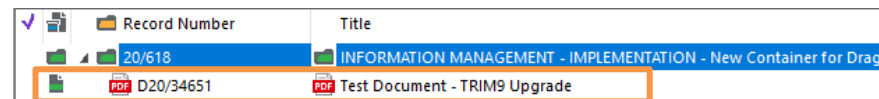
4. The previous tab will become the current tab. Keep the mouse button depressed, and drag the document to the new container, then release the mouse button:



5. When you drop the record on the new container, the **'Put Record in Container'** window will appear. This window lists the 'Current container' that the record resides within, and the 'New container' that you are about to move the record to. Click **OK** to confirm the move:



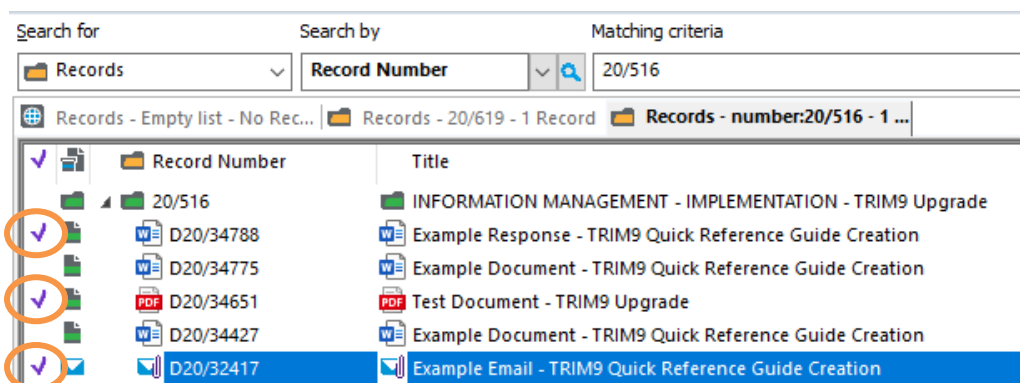
6. The record has now been moved to the new container:



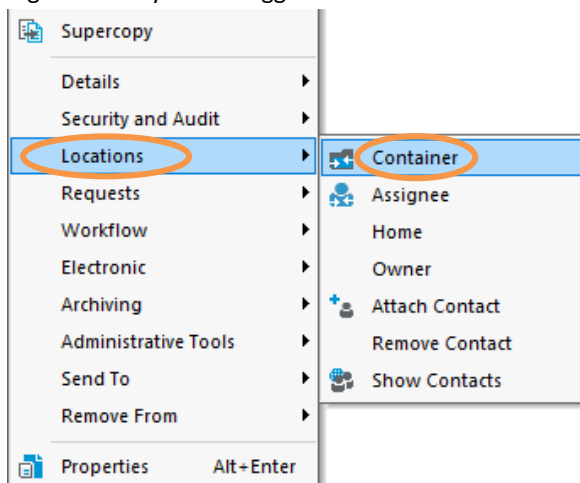
## Moving Multiple Records to a New Container

It is possible to move multiple records to a new container at the same time:

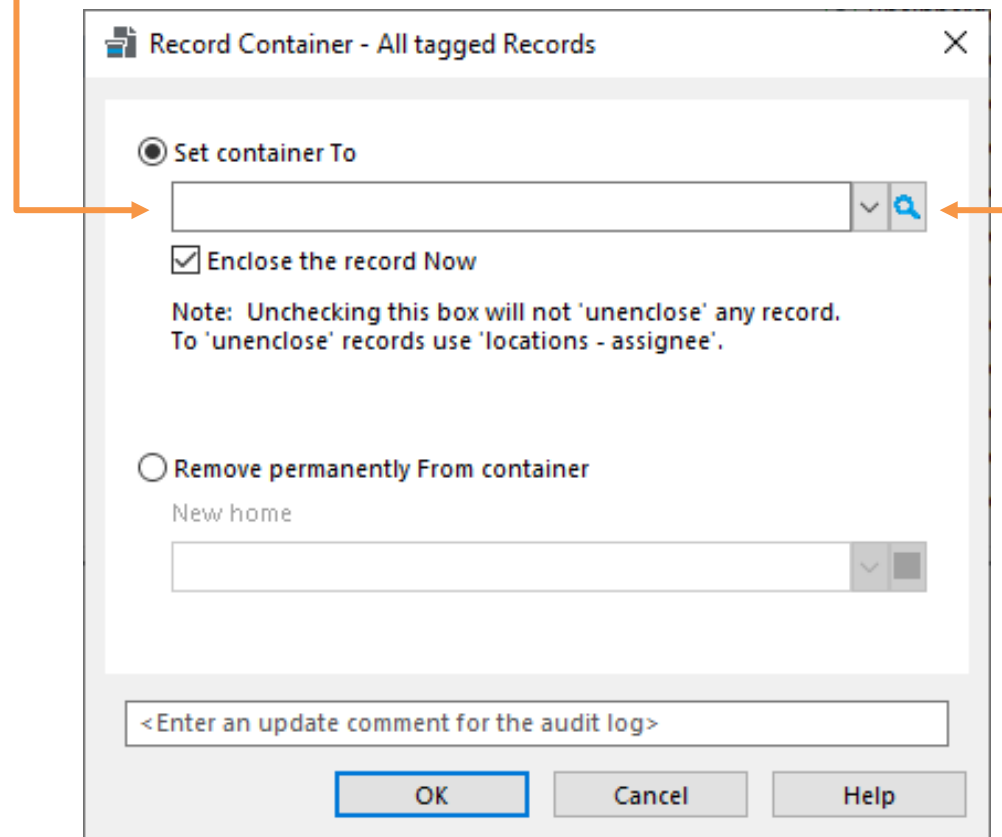
1. Locate and display on screen all the records which you want to move to a new container.
2. Tag all the records you would like to move by clicking to the left of them in the **List Pane**:



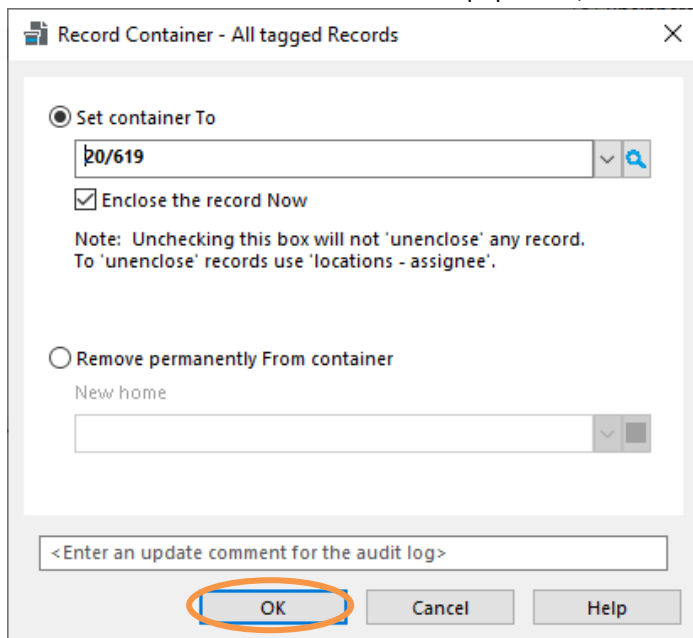
3. Right-click any of the tagged records and select **Locations** → **Container**:



4. The **'Record Container - All tagged Records'** window will appear. If you know the record number for the container which you want to move the records to, type it into the 'Set container To' field. Otherwise, you can click the **Search magnifying glass** button to either search for the container manually, or perhaps locate it via **Shortcuts** such as **Favorites** or **Recent Containers**:



5. Once the 'Set container To' field has been populated, click **OK**:



7. The records will now be moved to their new container.

6. Click **Yes to All**:

