





Cabinets

The purpose of a Cabinet in TRIM9 is to group together folders with similar subject matter. A prime example is the Student Cabinet, where a Student Cabinet is automatically created for each student via integration with NUSTAR, and inside that cabinet are all the folders which pertain to that student (refer example below):

2345678	BAYGOH Winnie 2345678
2345678/01	HDR - BAYGOH Winnie 2345678
2345678-16	ESOS - BAYGOH Winnie 2345678
2345678-15	Disability Support - BAYGOH Winnie 2345678
2345678-14	Loans - 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
2345678-06	Careers and Development - BAYGOH Winnie 2345678
2345678-05	Credit - BAYGOH Winnie 2345678
2345678-04	Enrolment and Progression - BAYGOH Winnie 2345678
2345678-03	Admissions - BAYGOH Winnie 2345678
2345678-02	Case Management - BAYGOH Winnie 2345678
2345678-01	Academic Support - BAYGOH Winnie 2345678

The Student Cabinet makes finding and working with student records simple and easy. However, if you would like to use cabinets for organising other records, then you will need to use the Electronic Cabinet record types:

-  ELECTRONIC CABINET - LEVEL 1
-  ELECTRONIC CABINET - LEVEL 2
-  ELECTRONIC CABINET - LEVEL 3
-  ELECTRONIC CABINET - LEVEL 4

Hint: In TRIM9; cabinets, along with folders (files) and sub-folders are all referred to as **Containers** as they can contain other records.

Electronic Cabinets can be used in two different ways in TRIM9. The first way is to create one stand-alone cabinet; and place all folders that pertain to that cabinet within it. Please see example below:

Record Number	Title
C20/85	TRIM Training
19/455	PERSONNEL - STAFF DEVELOPMENT - Training - One on One / Adhoc TRIM Training - 2019
18/1170	PERSONNEL - STAFF DEVELOPMENT - Training - One on One / Adhoc TRIM Training - 2018
17/1441	TEACHING - COURSE DELIVERY - Resources & Working Papers - TRIM Training - Courses Listed - 2017
16/6133	TEACHING - COURSE DELIVERY - Resources & Working Papers - TRIM - Drop In Session
16/6131	TEACHING - COURSE DELIVERY - Resources & Working Papers - TRIM - Drop In Session Presentation
16/3279	TEACHING - COURSE DELIVERY - Resources & Working Papers - TRIM Training - Courses Listed - 2016

The second way is to use cabinets to create a hierarchical file structure for a Faculty, School, Team etc., like that of a share drive structure. Used in this way, the structure can have up to four levels of cabinets. An example of a hierarchical file structure using cabinets is below:

Record Number	Title
C20/86	Records Governance Services (RGS)
C20/86/10	Personnel Management - RGS
C20/86/09	TRIM Rollouts
C20/86/08	AURA Benchmarking Surveys
C20/86/07	Business System Recordkeeping Assessments
C20/86/06	Meetings
C20/86/05	Policies - Procedures - Templates
C20/86/04	Records Disposals
C20/86/03	TRIM Upgrades
C20/86/02	TRIM Champions
C20/86/01	TRIM Training
C20/86/01/003	One on One / Adhoc Training
19/455	PERSONNEL - STAFF DEVELOPMENT - Training - One on One / Adhoc TRIM Training - 2019
18/1170	PERSONNEL - STAFF DEVELOPMENT - Training - One on One / Adhoc TRIM Training - 2018
C20/86/01/002	Scheduled Sessions
17/1441	TEACHING - COURSE DELIVERY - Resources & Working Papers - TRIM Training - Courses Listed - 2017
16/3279	TEACHING - COURSE DELIVERY - Resources & Working Papers - TRIM Training - Courses Listed - 2016
C20/86/01/001	Drop In Sessions
16/6133	TEACHING - COURSE DELIVERY - Resources & Working Papers - TRIM - Drop In Session
16/6131	TEACHING - COURSE DELIVERY - Resources & Working Papers - TRIM - Drop In Session Presentation

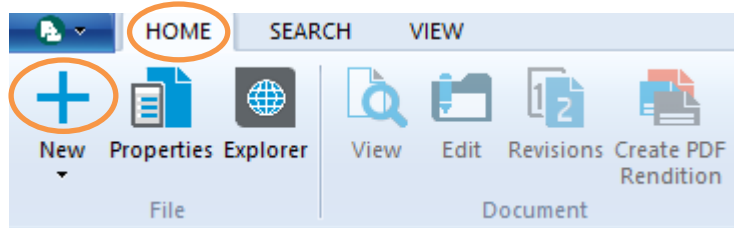
Note: Only folders (files) and lower level cabinets can be contained directly within a cabinet (i.e. no sub-folders, no emails, no Word documents etc.).

Note: Before creating a Cabinet, it is a good idea to conduct a search of TRIM9 to ensure a cabinet of the same or similar name which will meet your requirements doesn't already exist.

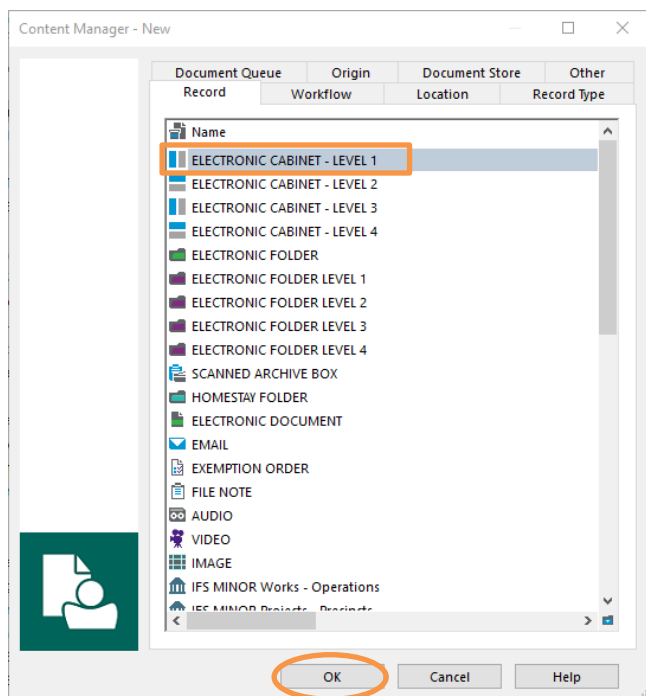
Creating Stand-Alone Cabinets

If you would like to create a stand-alone cabinet which **does not** reside inside another cabinet:

1. Ensure the 'HOME' tab is selected, then click on the **New** button:

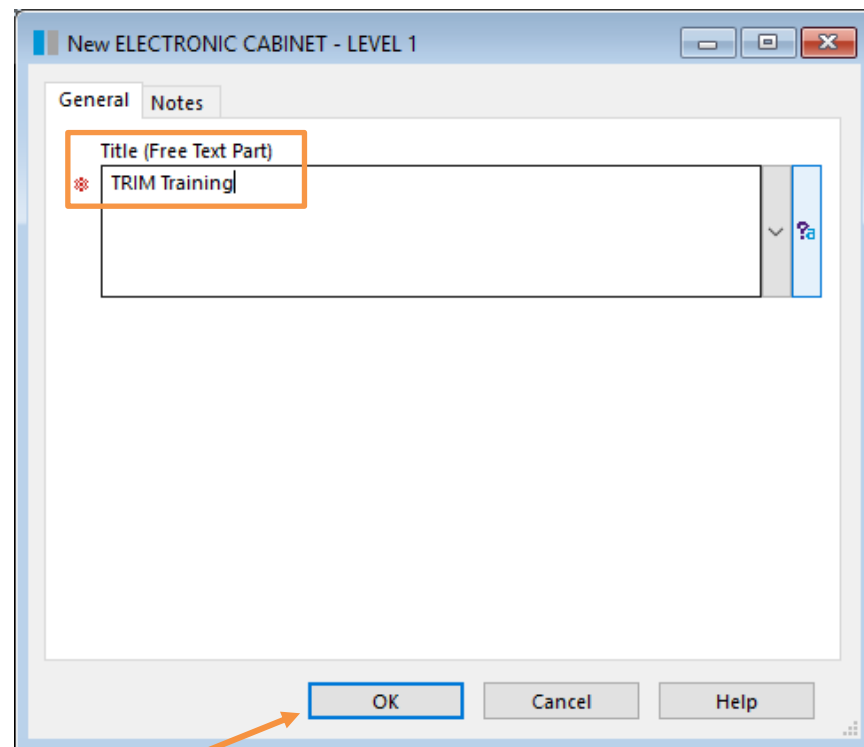


2. Select **ELECTRONIC CABINET - LEVEL 1**, then click **OK**:



3. The **Record Entry Form** will display. In the 'Title (Free Text Part)' field type in an appropriate title for your cabinet in line with any local naming guidelines or general UON titling guidance.

Hint: If you require assistance with titling please refer to the [TRIM9 - Quick Reference Guide - D18/353404 - TRIM9 Record Titling](#)



4. Click **OK** to create the cabinet.
5. Your new cabinet will appear in TRIM9:

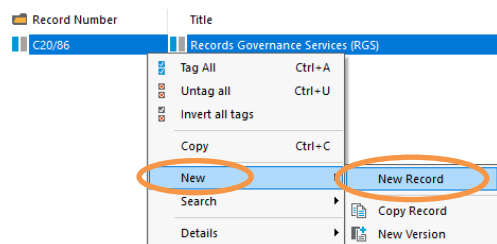
Record Number	Title
C20/85	TRIM Training

Note: Prior to creating your own hierarchical file structure, it is strongly recommended that you contact Records Governance Services (RGS) (records@newcastle.edu.au) to discuss requirements and seek advice. RGS will be able to assist with setting up your file structure both compliantly and in the most user friendly way possible.

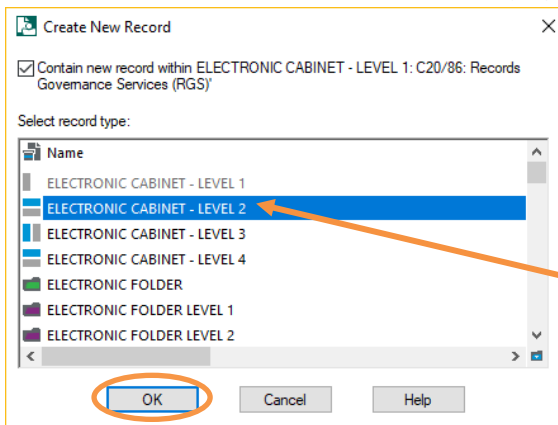
Creating a Hierarchical File Structure using Cabinets

Creating a hierarchical file structure using cabinets requires creating a cabinet inside another cabinet. To create a cabinet which resides within another cabinet:

1. If you are adding a cabinet to an existing hierarchical file structure; locate the cabinet which you want to create a new cabinet within. If you are creating a new hierarchical file structure and the cabinet which you want to create a cabinet within doesn't exist yet; create the top cabinet by following the instructions in the [Creating Stand-Alone Cabinets](#) section on the previous page.
2. Right-click on the cabinet which you want to create a cabinet within, then select **New** → **New Record**:



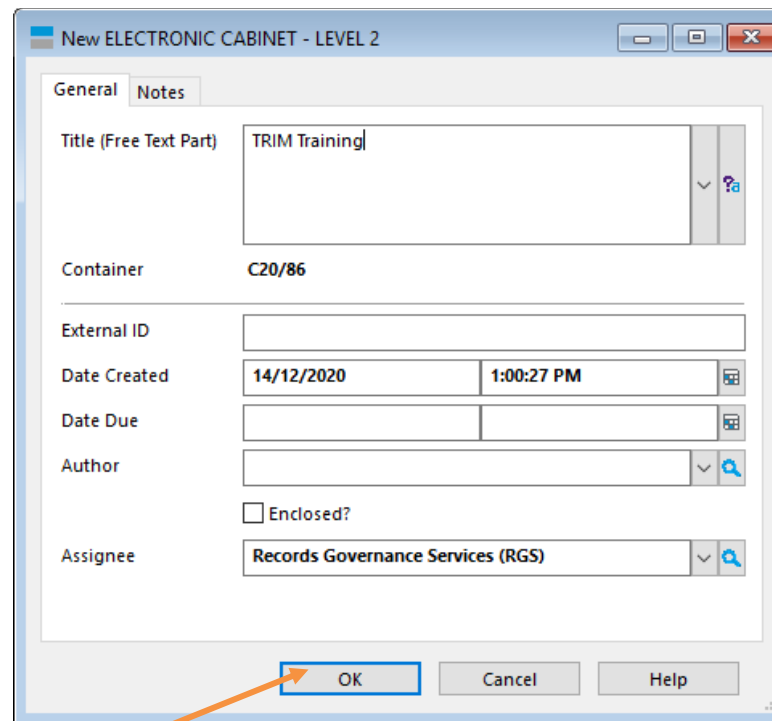
3. The 'Create New Record' window will display:



The appropriate level of Electronic Cabinet will be automatically selected for you based on what level of cabinet you are creating your new cabinet within. E.g. if you are creating a new cabinet inside a Level 1 cabinet, then **ELECTRONIC CABINET – LEVEL 2** will be highlighted as in the screenshot to the left. Click **OK**.

4. The **Record Entry Form** will display. In the 'Title (Free Text Part)' field type in an appropriate title for your cabinet in line with any local naming guidelines or general UON titling guidance.

Hint: If you require assistance with titling please refer to the [TRIM9 - Quick Reference Guide - D18/353404 - TRIM9 Record Titling](#)



5. Click **OK** to create the cabinet.
6. Your new cabinet will appear in TRIM9:

Record Number	Title
C20/86/01	TRIM Training

7. To finish creating your hierarchical file structure (or to add to it at any time); you will need to repeat Steps 1 through 6 above as required.