Copying Folders (Files)

Folders (files) are the level at which Records Governance compliance is achieved. For this reason, there is often fields on the Record Entry Form for folders (files) that require you to select an appropriate Classification and Security/Access Controls based on the information to be housed in that folder (file). Folders (files) can contain sub-folders, documents, emails, photos etc.

Note: Some TRIM record types of this level use the terminology 'folder' whilst others use the terminology 'file'. For the remainder of this guide, folder will be used to refer to both folder and file record types.

Creating folders is generally more difficult than creating cabinets and sub-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. For this reason, when you need to create a new folder, if a folder already exists which isn't appropriate to use (e.g., because it's out of date) but otherwise has all the settings that your new folder needs (e.g., Classification and Security/Access Controls), then it is much quicker and easier to copy that folder rather than create a new one from scratch.

Hint: In TRIM; folders, along with cabinets and sub-folders are all referred to as **Containers** as they can <u>contain</u> other records.

To copy a folder:

1. Locate the folder which you want to copy.

2. Right-click on the folder and select **New → Copy Record**
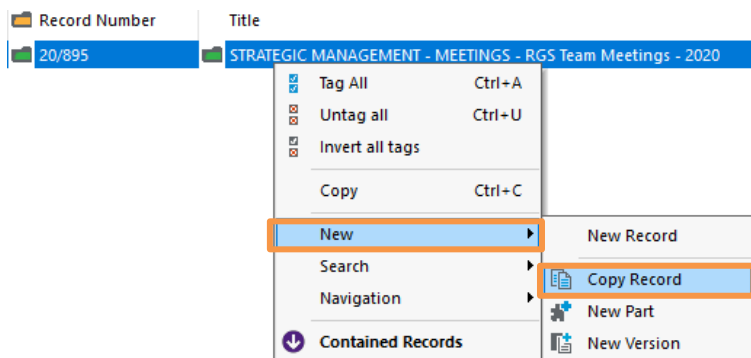
3. The **'Copy Record'** window will appear. With consideration of the below advice, select the properties to copy and other options as required:

   Note: It is important to ensure the 'Disposition' and 'Date fields' checkboxes are **not** ticked. This is because if you happen to be copying an inactive or closed folder, then your new folder will also be inactive and/or closed if you don't untick these two checkboxes.
   Note: Check that the Relate the records as 'Original/Copy' is unticked. This will prevent an unnecessary warning message displaying each time a record is added to the folder.

   Hint: If the folder you are copying is in a container then the **'Container'** field will be populated with that container's record number, otherwise this field will be blank. You can leave as is, update or delete as appropriate.

   Hint: You can choose to create more than one copy by updating the 'Number of copies' field as appropriate.
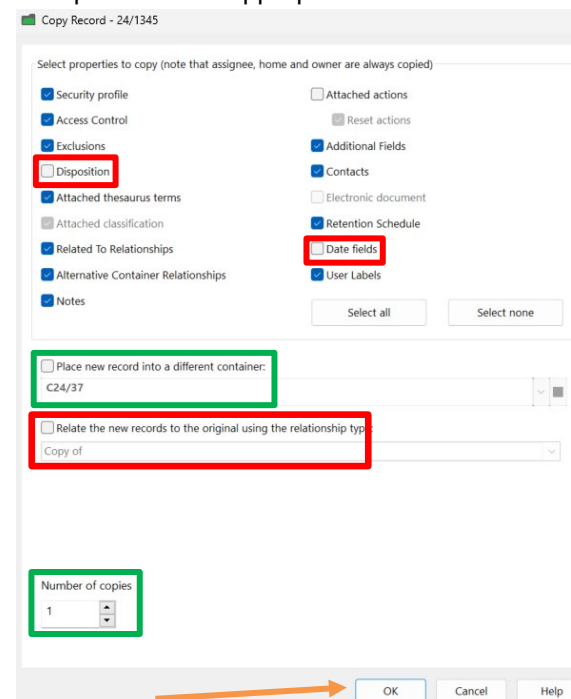
4. Select **OK** to copy the folder.

5. The folder you copied, and your new folder(s) will appear on screen. Your new folder(s) will have a number in brackets at the end of its title:

6. Right-click on your new folder and select **Properties**, then remove the number in brackets and update the title as appropriate. I.e., in the below example I would update 2020 to 2021:

7. Once the title has been updated, click **OK**:

8. Your new folder is now ready to use: