Sub-Folders

Sub-folders (Electronic Folder Level 1, Electronic Folder Level 2 etc.) can be used inside of folders to sort and organise records, and make finding records easier; particularly when the folder contains many records. Sub-folders can contain lower level sub-folders, documents, emails, photos etc.

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

When using sub-folders inside a folder, you can have up to four levels of sub-folders:

> This first screenshot demonstrates one level of sub-folders inside a folder.

> This second screenshot is an example where three levels of sub-folders have been created inside a folder.
>
> Note the 'LEVEL 2' sub-folders inside the 'LEVEL 1' sub-folder, and note the 'LEVEL 3' sub-folders inside the 'LEVEL 2' sub-folder.
>
> **Note:** It is best practice to not create sub-folders unnecessarily. I.e. if a container only has a small amount of records in it, sub-folders may not be necessary, and instead ensuring the records in the container are titled well may be all that is required.
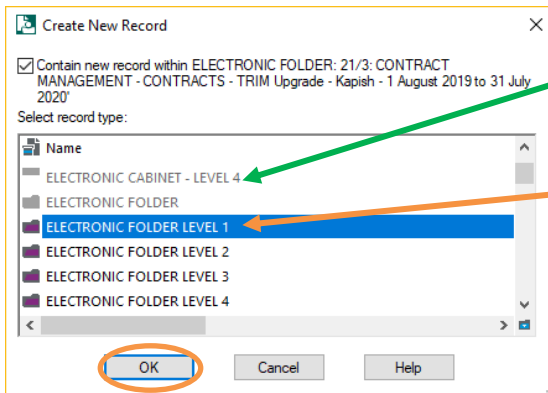
Creating a Sub-Folder in a Folder

If you would like to create a sub-folder inside a folder:

1. Locate the folder which you want to create a sub-folder within.

2. Right-click on the folder which you want to create a sub-folder within, then select **New → New Record**:
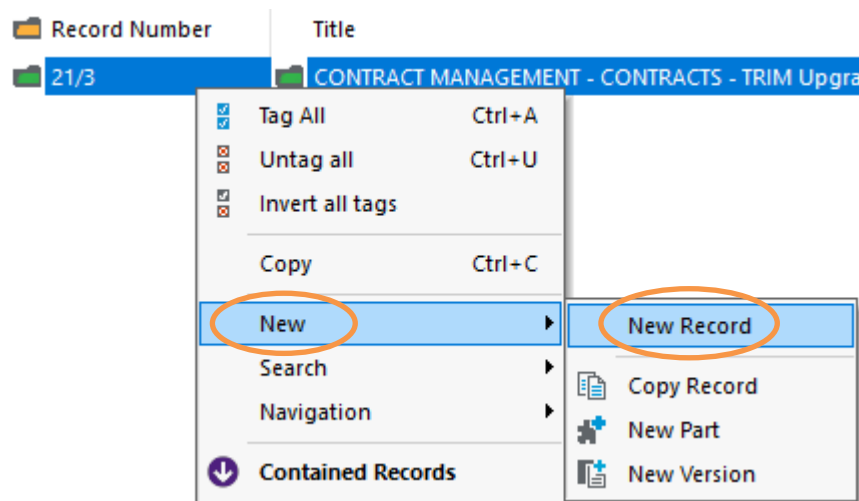
3. The 'Create New Record' window will display:

Hint: Record types which can't be placed inside your selected folder will be greyed out.

Note the four levels of sub-folders (ELECTRONIC FOLDERS) available to select. The appropriate level of sub-folder should be automatically selected for you.

Click **OK**.

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

Hint: If you require assistance with titling please refer to the *TRIM - Quick Reference Guide - D18/353404 - TRIM Record Titling*
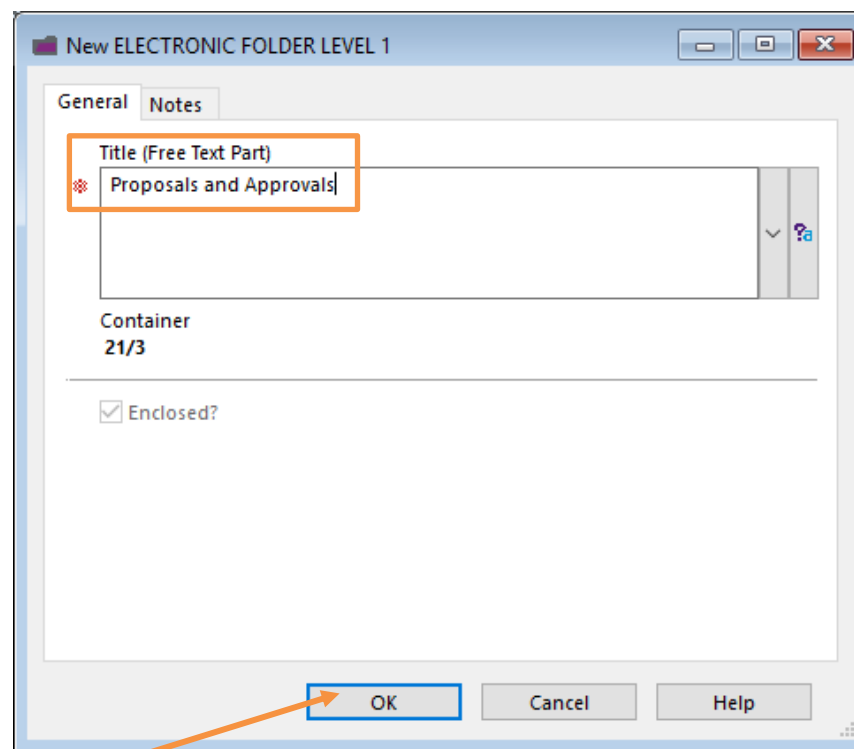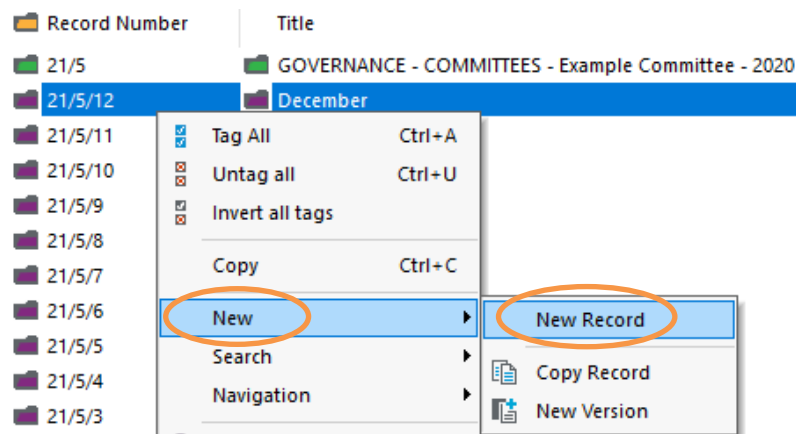

5. Click **OK** to create the sub-folder.

6. Your new sub-folder will appear in TRIM9:

Creating a Sub-Folder in a Sub-Folder

If you would like to create a lower level sub-folder inside a sub-folder:

1. Locate the sub-folder which you want to create a sub-folder within.

2. Right-click on the sub-folder which you want to create a lower level sub-folder within, then select **New → New Record**:
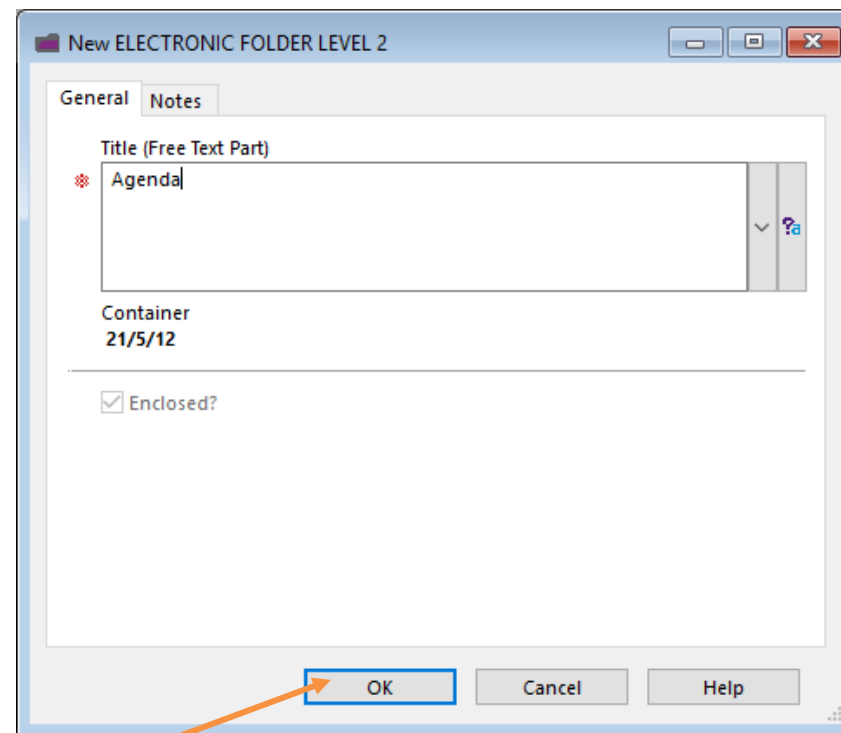

3. The 'Create New Record' window will display:
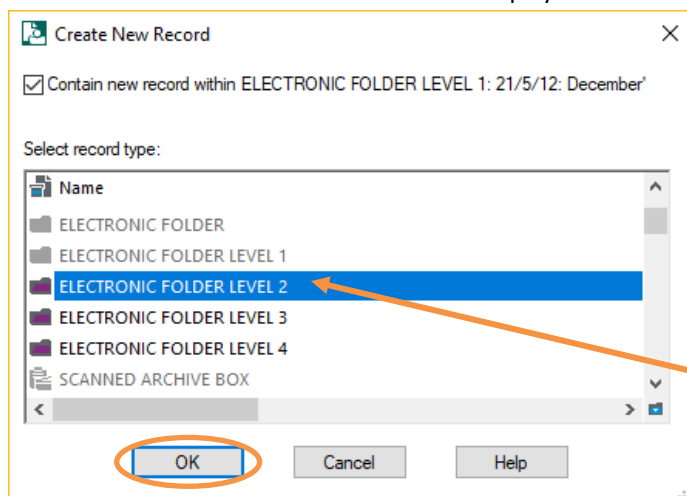
The appropriate level of sub-folder will be automatically selected for you based on what level of sub-folder you are creating your new sub-folder within. E.g. if you are creating a new sub-folder inside a Level 1 sub-folder, then **ELECTRONIC FOLDER LEVEL 2** will be highlighted as in the screenshot 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 sub-folder in line with any local naming guidelines or general UON titling guidance.

Hint: If you require assistance with titling please refer to the _TRIM - Quick Reference Guide - D18/353404 - TRIM Record Titling_

5. Click **OK** to create the sub-folder.

6. Your new sub-folder will appear in TRIM: