

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.

Record Type	Record Number	Title
ELECTRONIC FOLDER	21/3	CONTRACT MANAGEMENT - CONTRACTS - TRIM Upgrade - Kapish - 1 Augu
ELECTRONIC FOLDER LEVEL 1	21/3/4	Proposals and Approvals
ELECTRONIC FOLDER LEVEL 1	21/3/3	Drafts
ELECTRONIC FOLDER LEVEL 1	21/3/2	Correspondence
ELECTRONIC FOLDER LEVEL 1	21/3/1	Executed Agreement

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.

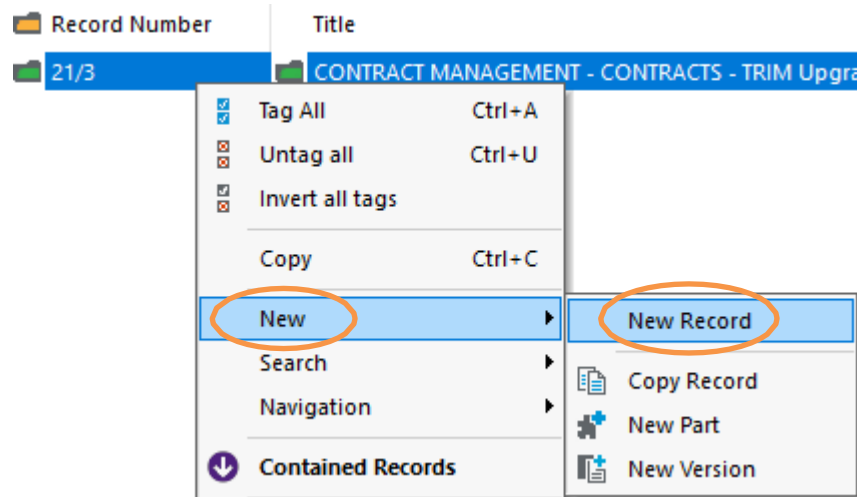
Record Type	Record Number	Title
ELECTRONIC FOLDER	21/5	GOVERNANCE - COMMITTEES - Example Committee - 2020
ELECTRONIC FOLDER LEVEL 1	21/5/12	December
ELECTRONIC FOLDER LEVEL 2	21/5/12/5	Agenda
ELECTRONIC FOLDER LEVEL 2	21/5/12/4	Outstanding Actions
ELECTRONIC FOLDER LEVEL 2	21/5/12/3	Documents
ELECTRONIC FOLDER LEVEL 2	21/5/12/2	Minutes
ELECTRONIC FOLDER LEVEL 2	21/5/12/1	Meeting Outcomes
ELECTRONIC FOLDER LEVEL 3	21/5/12/1/3	Email Notification of Outcomes
ELECTRONIC FOLDER LEVEL 3	21/5/12/1/2	Formal Correspondence
ELECTRONIC FOLDER LEVEL 3	21/5/12/1/1	Communique
ELECTRONIC FOLDER LEVEL 1	21/5/11	November
ELECTRONIC FOLDER LEVEL 1	21/5/10	October
ELECTRONIC FOLDER LEVEL 1	21/5/9	September
ELECTRONIC FOLDER LEVEL 1	21/5/8	August
ELECTRONIC FOLDER LEVEL 1	21/5/7	July
ELECTRONIC FOLDER LEVEL 1	21/5/6	June
ELECTRONIC FOLDER LEVEL 1	21/5/5	May

Creating a Sub-Folder in a Folder

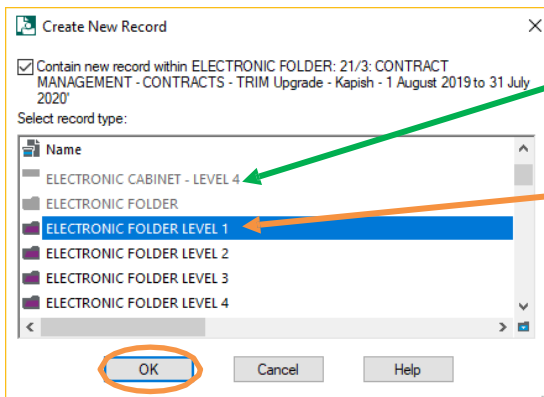
If you would like to create a sub-folder inside a folder:

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:



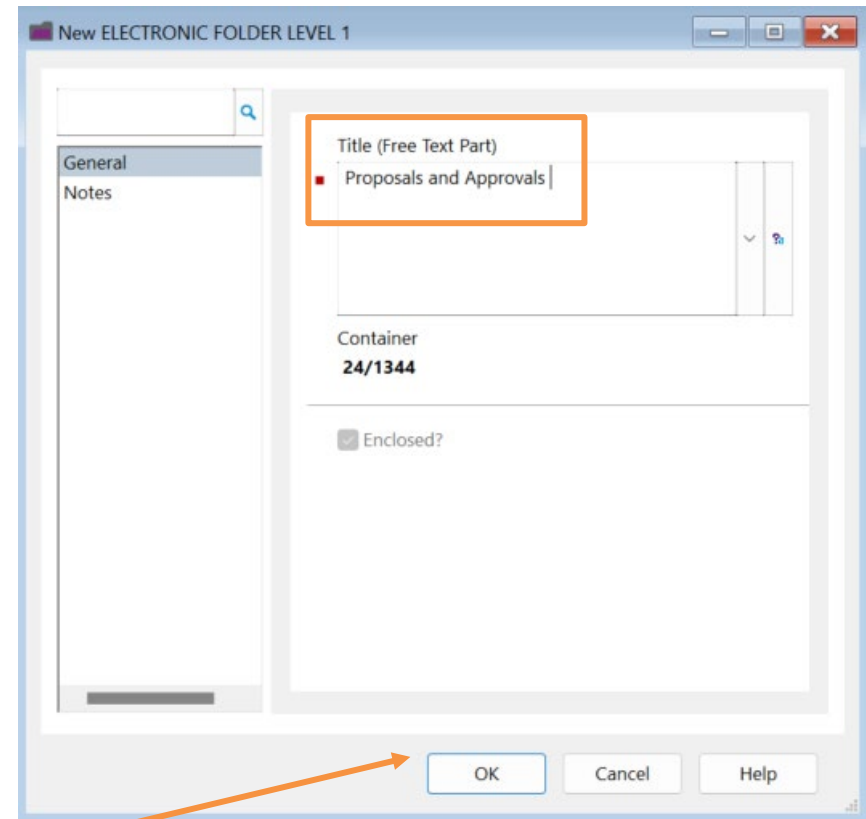
Hint: Record types which can't be placed inside your selected folder will be greyed out.

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](#)



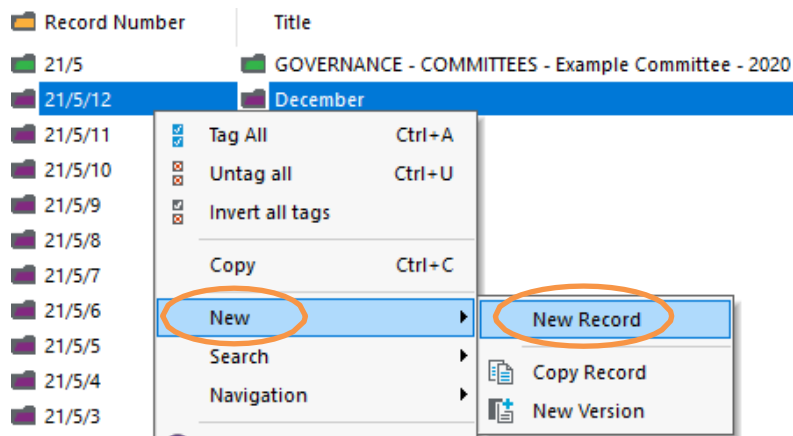
5. Click **OK** to create the sub-folder.
6. Your new sub-folder will appear in TRIM:



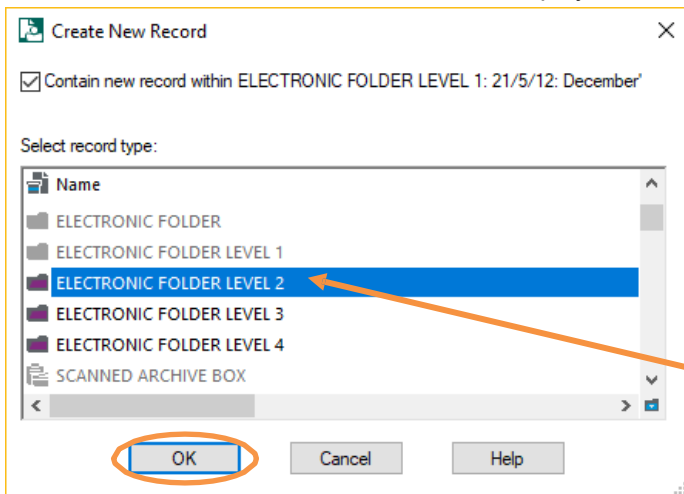
Creating a Sub-Folder in a Sub-Folder

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**:



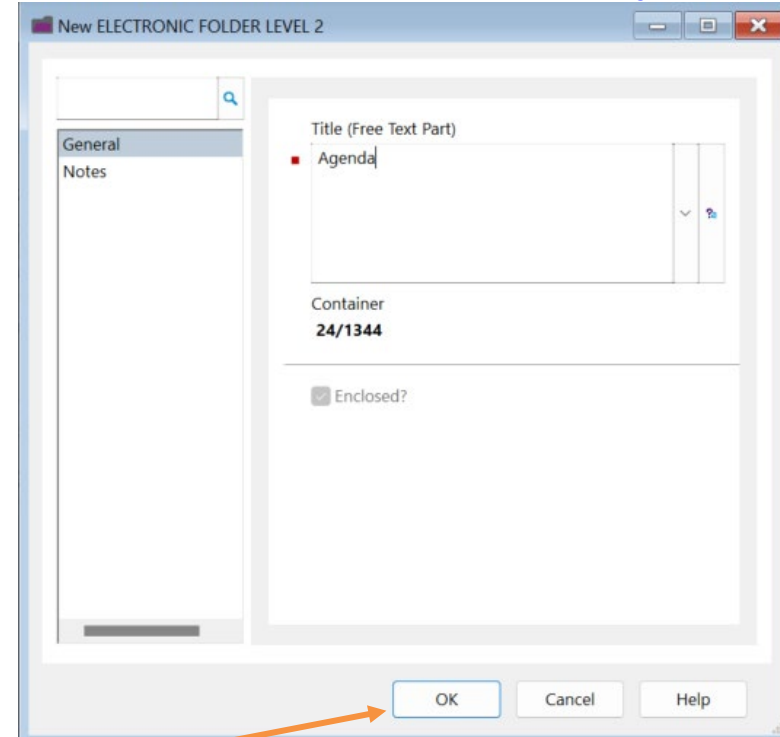
3. The 'Create New Record' window will display:



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:

