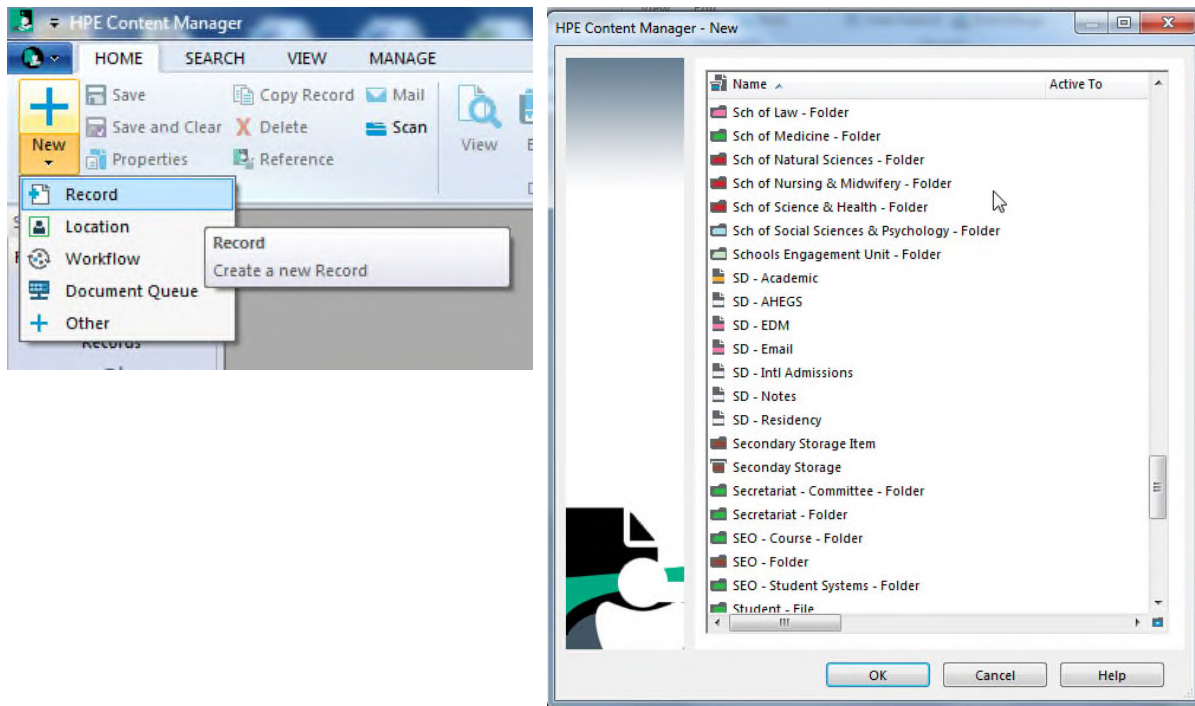


TRIM9 – Create a folder (June 2018)

From the **Home** ribbon, click **New – Record** and Select the **Type of Folder** you will create

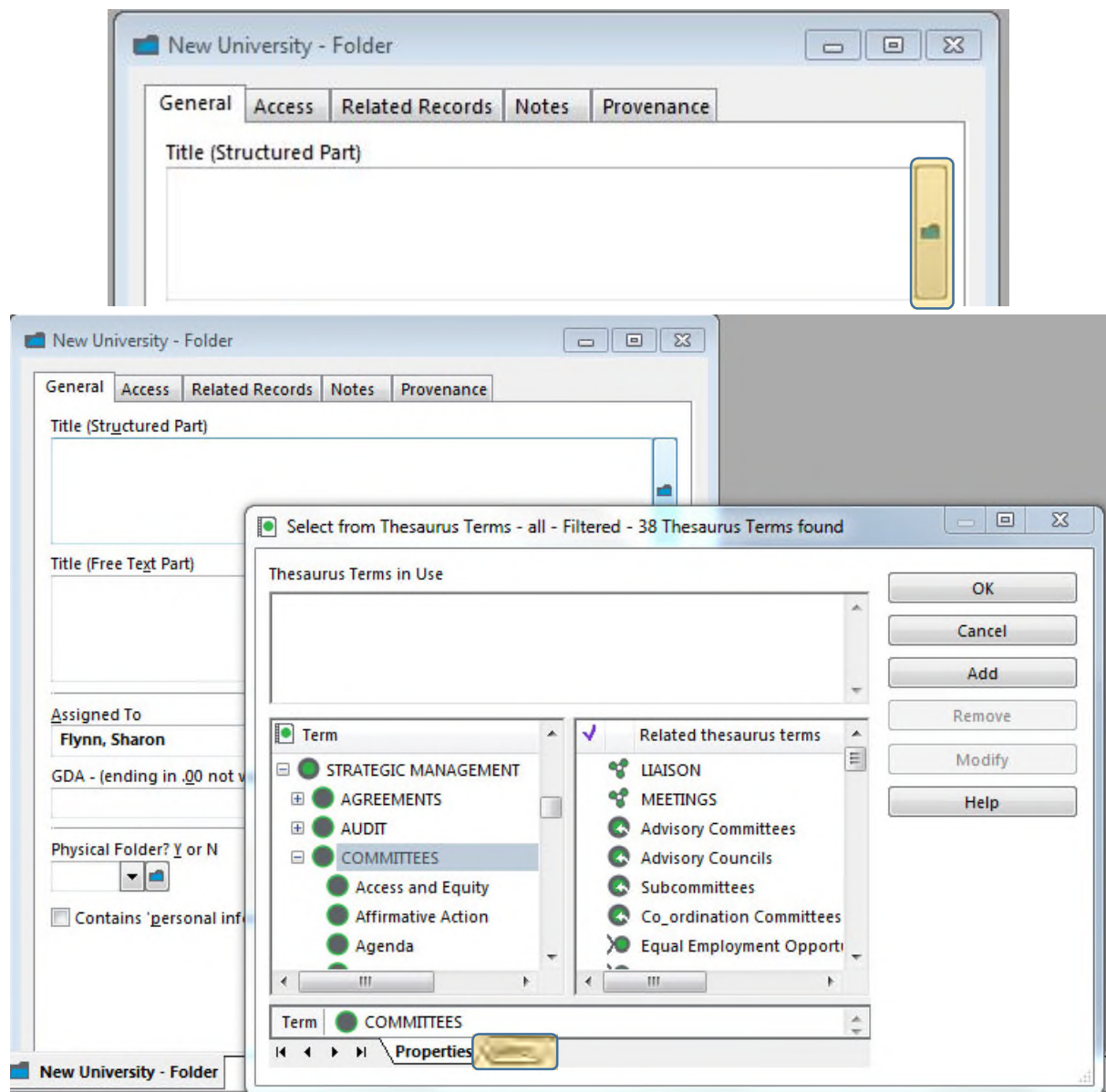


Before creating the folder, think about the information you will be saving to it and answer the following questions:

Questions about the content of the folder	Corresponding TRIM Field
<i>What will the title be?</i>	Keyword/Activity/Subject/Free Text
<i>What date did the matter/project commence?</i>	Date created
<i>Does it already have an end date?</i>	Date closed – if not, leave blank (the retention rules will not commence until the file is closed)
<i>Who will the main contact person be?</i>	Assignee?
<i>How long must the file be kept after it is closed?</i>	GDA – refer to the RIF*
<i>Will you create a hard copy of this file?</i>	Physical File Y or N?
<i>Who should have access to it – who needs to share/collaborate with you on this?</i>	Access Tab
Additional information may be added to the Related Records and Notes Tab if necessary.	
<i>*The RIF (Records Information Form) relevant to the work you do is available from RAMS and will assist you to complete the TRIM Record Entry Form</i>	

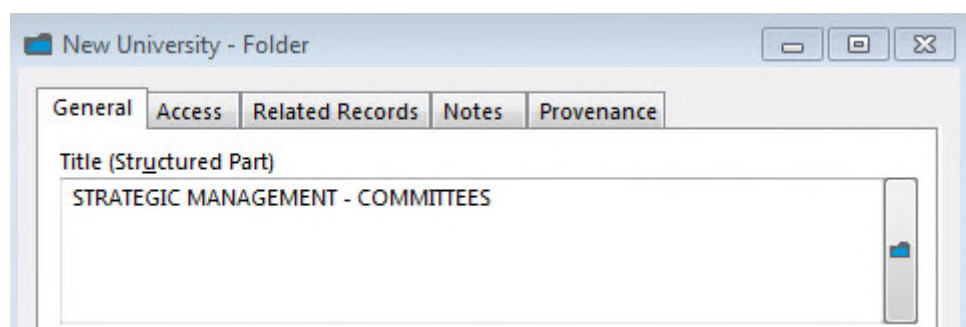
TRIM9 – Create a folder (June 2018)

Click on the **Quick Select** button to reveal **Structured Titling** options



Select a Top Level Term (**Keyword**) and Second Level Term (**Activity**) and click **OK** to add it to the **Title (Structured Part)** field.

***Note:** A Third Level Term can also be used, but is not mandatory. The **Notes** tab provides a description of the term selected.*



TRIM9 – Create a folder (June 2018)

Complete remaining fields on the **General Tab** before moving to the **Access Tab**.

The screenshot shows the 'New University - Folder' dialog box with the 'General' tab selected. The 'Title (Structured Part)' field is filled with 'STRATEGIC MANAGEMENT - COMMITTEES'. The 'Assigned To' dropdown is set to 'Flynn, Sharon' and the 'Date Created' is '30/05/2018 4:47:38 PM'. The 'GDA' field is empty, with a note '(ending in .00 not valid)'. The 'Physical Folder?' dropdown is empty. There are checkboxes for 'Vital Record?', 'Contains personal information', and 'Commercial-in-Confidence'. The 'OK' button is circled in red with a prohibition sign, indicating it should not be clicked yet.

Note: Do Not Click OK yet. Mandatory fields **GDA** and **Physical Folder?** Must be completed before moving to the **Access Tab**

The screenshot shows the 'New University - Folder' dialog box with the 'Access' tab selected. The 'Security Level' dropdown is set to 'Unclassified'. The 'Active Security Caveats' section is empty. The 'Access Controls' section is highlighted with a yellow box and contains a table of permissions:

Access To	Details
View Document	<Unrestricted>
View Metadata	<Unrestricted>
Update Document	<Unrestricted>
Update Record Metadata	<Unrestricted>
Modify Record Access	<Unrestricted>
Destroy Record	People in (Records & Archives Managemen
Contribute Contents	<Unrestricted>

At the bottom of the 'Access Controls' section, there is a checkbox for 'Bypass Record Type access control references' and buttons for 'Clear', 'Container', 'Private', and 'Custom'. The 'OK' button is highlighted in blue.

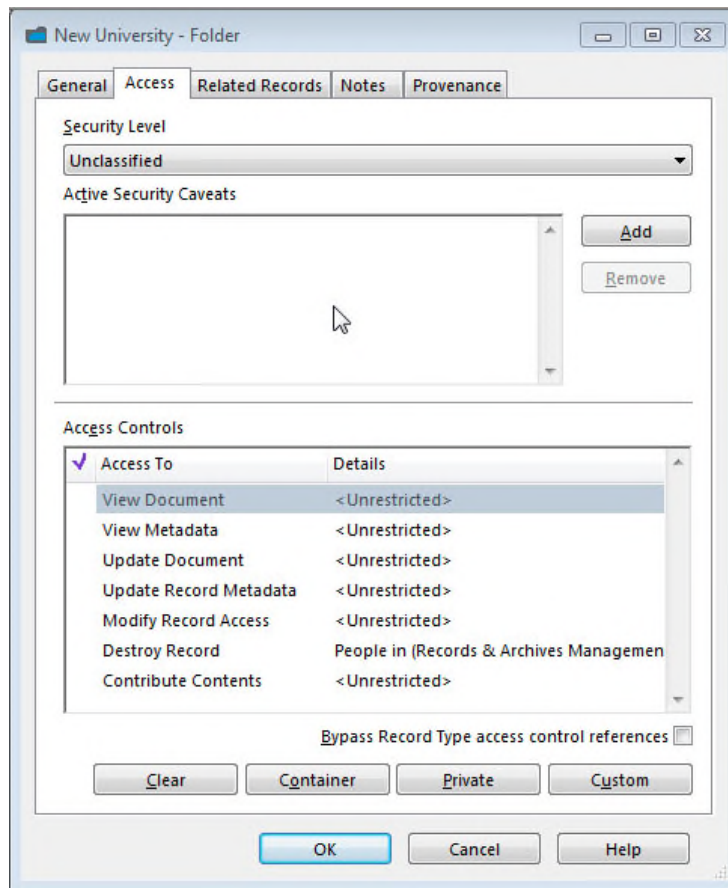
Explanatory notes about the use of Access Controls can be found in the table on the following page...

TRIM9 – Create a folder (June 2018)

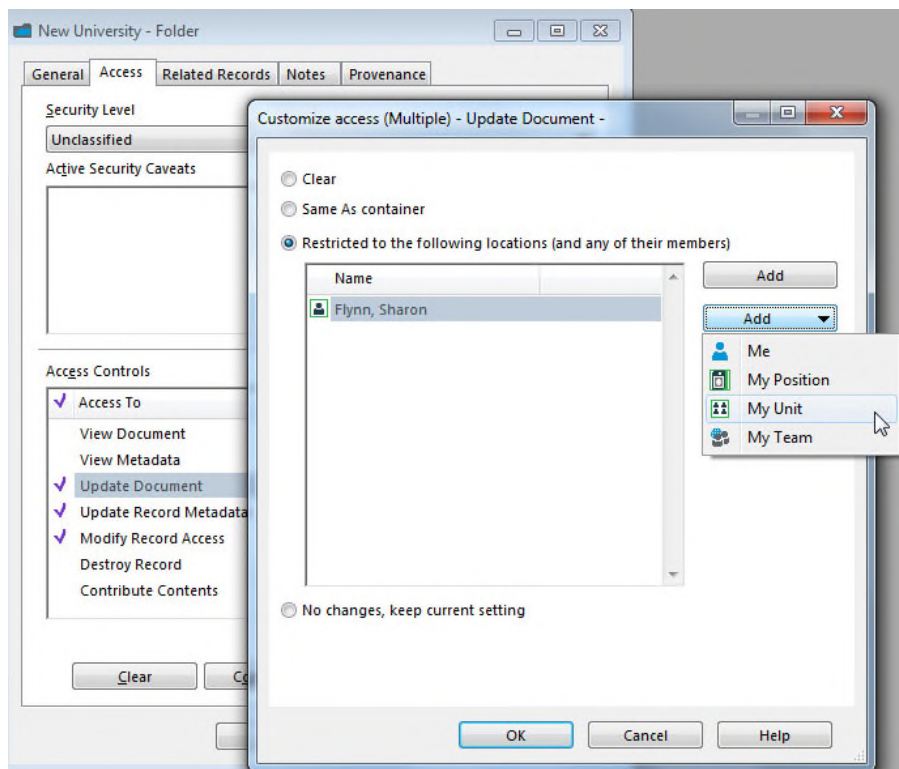
You may modify Access Controls for the following tasks (except Destroy Record):	
View Document	allows a person to see the records contained within the folder
View Metadata	allows a person to see the registered information (<i>that is, information about the record</i>) of records contained within the folder
Update Document	allows the Editing / Check In and Check Out of records contained within the folder
Update Record Metadata	allows modification of registered information of the folder and records contained within the folder
Modify Record Access	allows modification of Security and Access Controls for the folder
Destroy Record	the Destroy Record option is only available to RAMS staff
Contribute Contents	allows staff to contribute documents to the folder, even though they may not be permitted to see the folder itself or any of its contents
Once you select the tasks you wish to restrict, the following options for Access Controls :	
Everyone	Set the highlighted Access Control to Public (Everyone). This makes the selected control available to all users. No Access Control is applied to the item, or existing controls are deleted so that the item is made available to everyone. This means that all users with update permissions will be able to perform editing and updating functions.
Container	The document will inherit the Access Control properties of the folder it is contained in. This is particularly useful for workgroups who only have access to a project folder.
Private	Set the function so it can only be performed by the currently logged on user. When you click Private, your user name will be placed in the Details field. If an Organisation is selected, then all persons within that organisation will have access to the record. If a Group is selected, then all persons who belong to that group will have access to the record.
Custom	Specify positions, groups or organisations who will have access to the task. When you click Custom, the Customise Access (Access Settings) dialog box will display.
When you select either Everyone , Container or Private you will instantly see the modification to the record. When you select the Custom option you will be required to go through the following process.	

TRIM9 – Create a folder (June 2018)

Tag the **Tasks** you wish to restrict access to, click **Custom**.

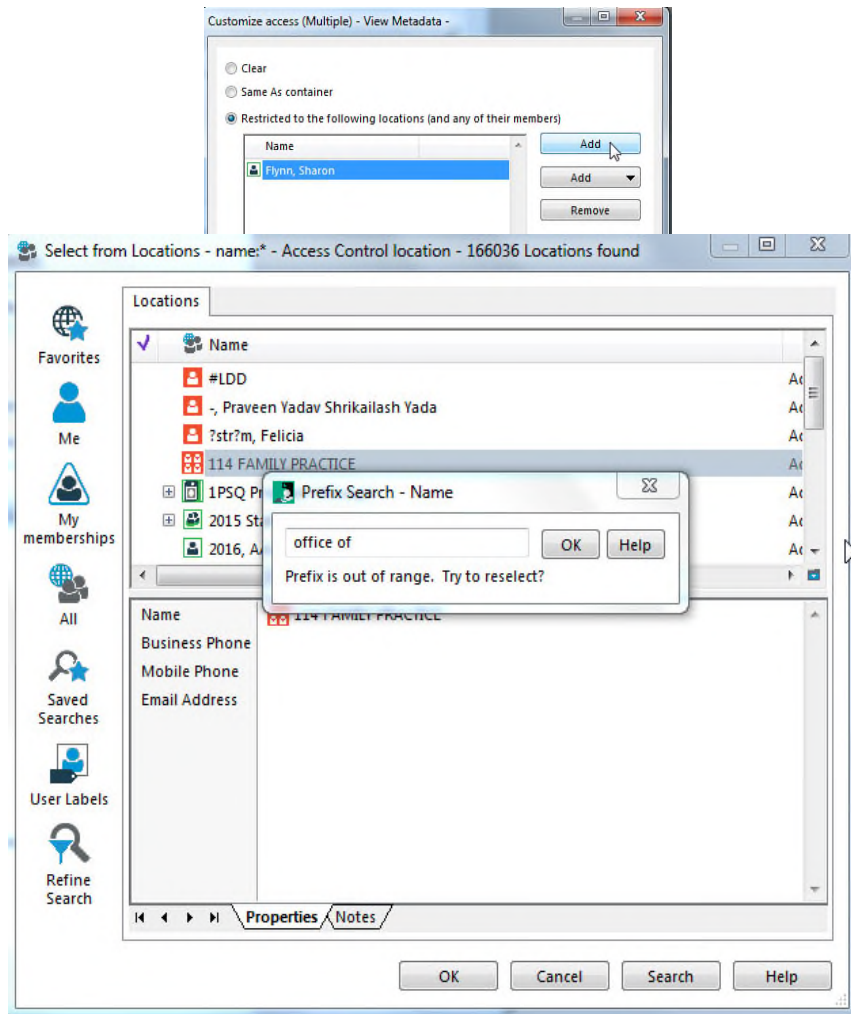


To restrict access to your business unit, **Add ▼ - My Unit** (remove your name)

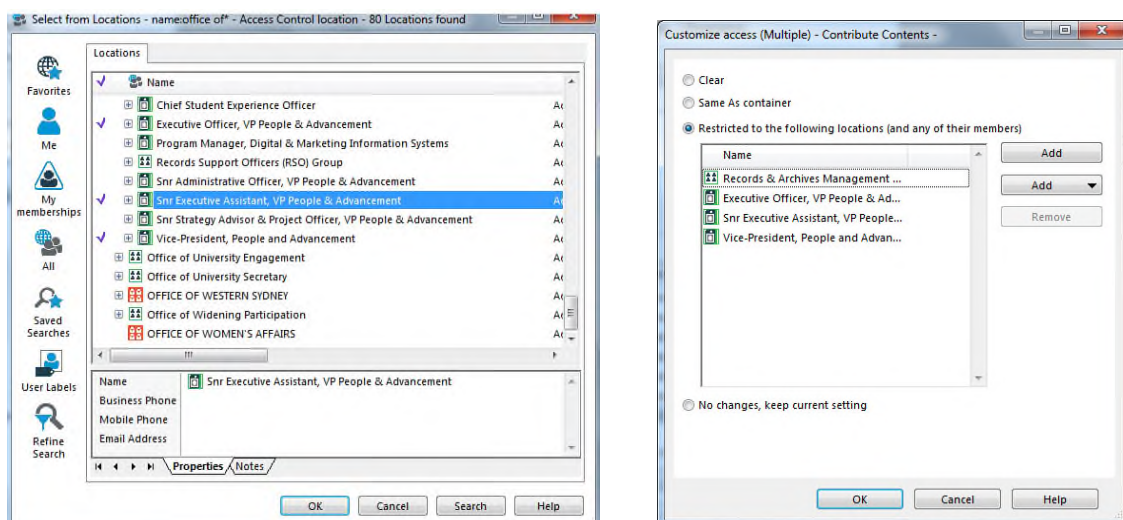


TRIM9 – Create a folder (June 2018)

To restrict access to others outside your Unit, **Add** – then **Search** from the locations list (Green icons represent internal staff, positions, business units. Red icons represent external people and organisations – including students).

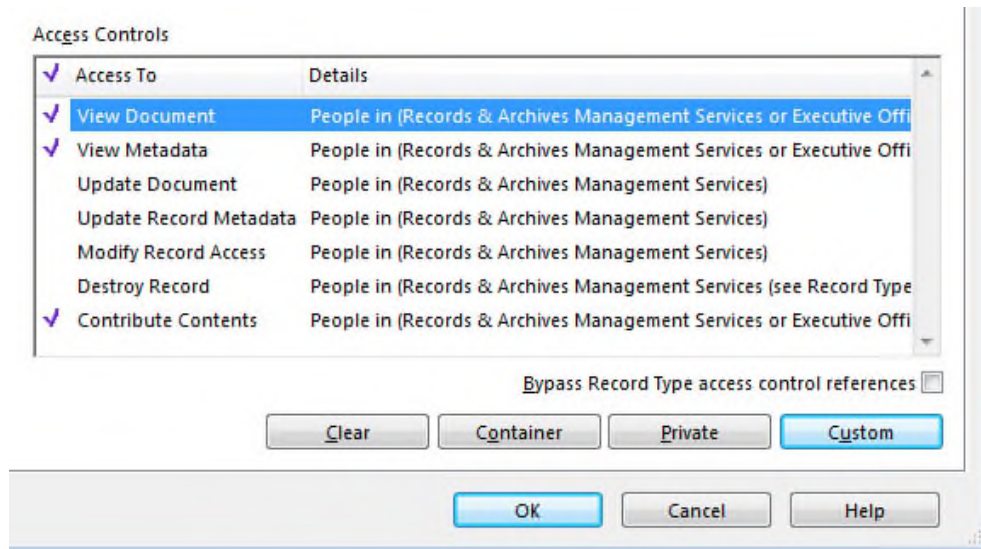


Note: You can tag multiple organisations/positions to add in bulk, click OK



TRIM9 – Create a folder (June 2018)

The final Access Controls will look something like this.



Click OK to create your new folder.

