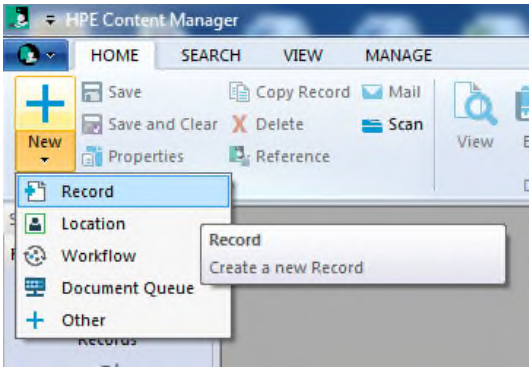
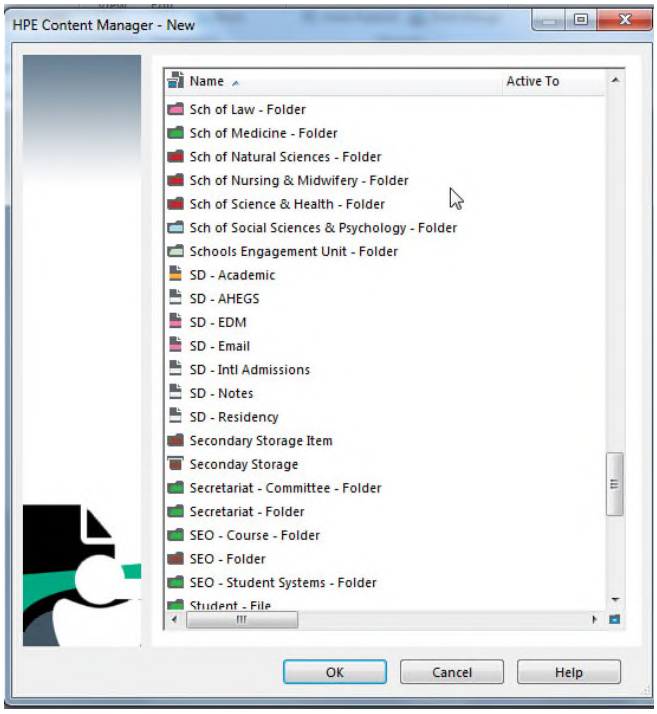
# TRIM9 – Create a folder (June 2018)

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 |
|---|---|
| *What will the title be?* | ***Keyword/Activity/Subject/Free Text*** |
| *What date did the matter/project commence?* | ***Date created*** |
| *Does it already have an end date?* | ***Date closed*** *– if not, leave blank (the retention rules will not commence until the file is closed)* |
| *Who will the main contact person be?* | ***Assignee?*** |
| *How long must the file be kept after it is closed?* | ***GDA – refer to the RIF**** |
| *Will you create a hard copy of this file?* | ***Physical File Y or N?*** |
| *Who should have access to it – who needs to share/collaborate with you on this?* | ***Access Tab*** |
| Additional information may be added to the Related Records and Notes Tab if necessary.<br><br>**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* | |

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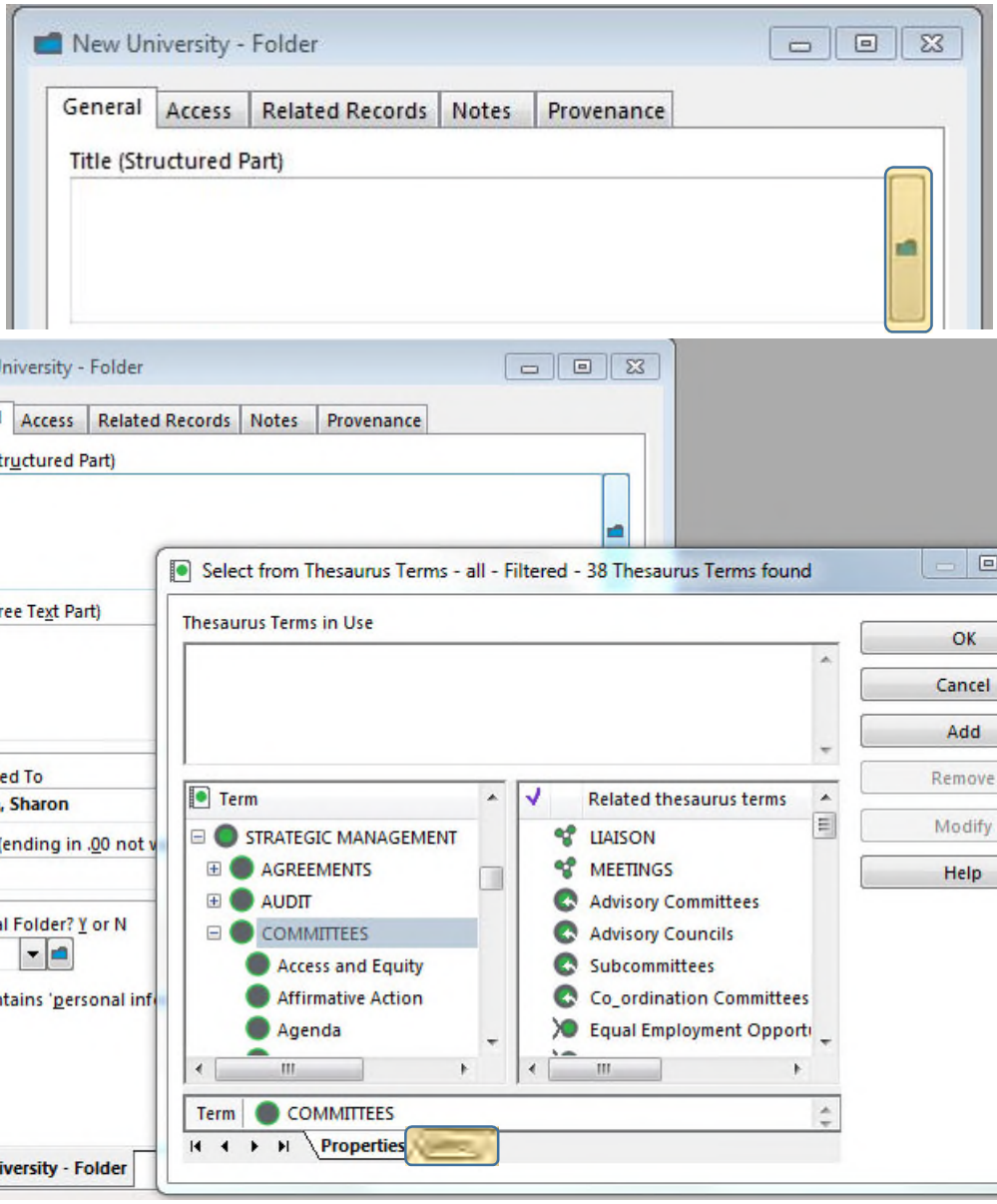
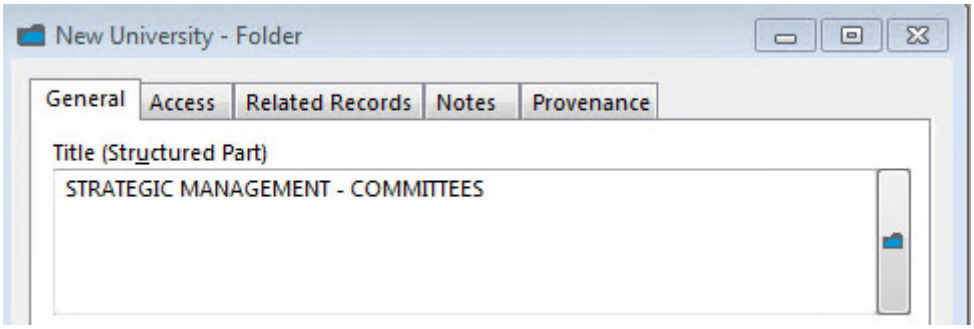
Click on the **Quick Select** button to reveal **Structured Titling options**

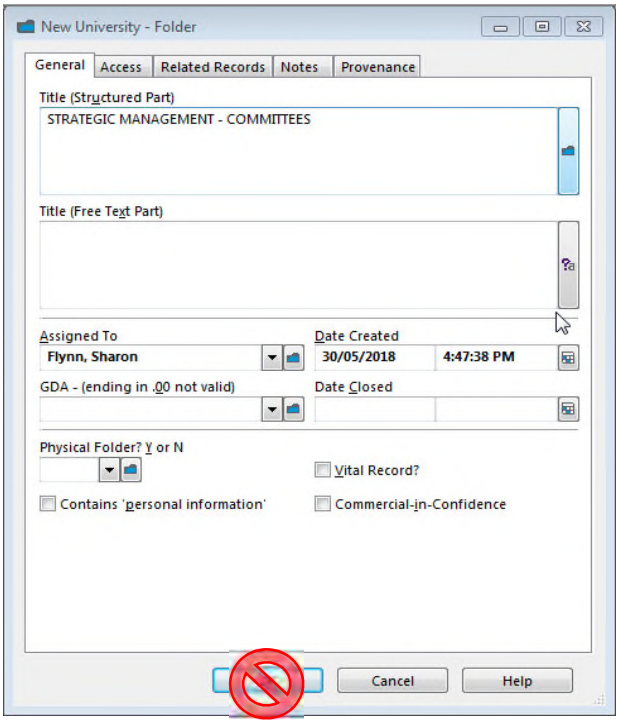



Select a Top Level Term (**Keyword**) and Second Level Term (**Activity**) and click **OK** to add it to the **Title (Structured Part)** field.

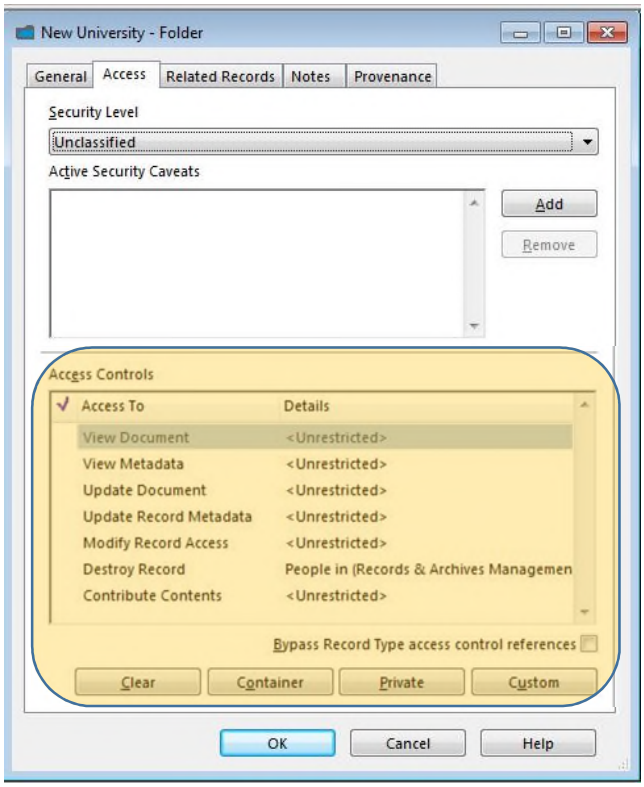
***Note:*** *A Third Level Term can also be used, but is not mandatory. The* ***Notes*** *tab provides a description of the term selected.*



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



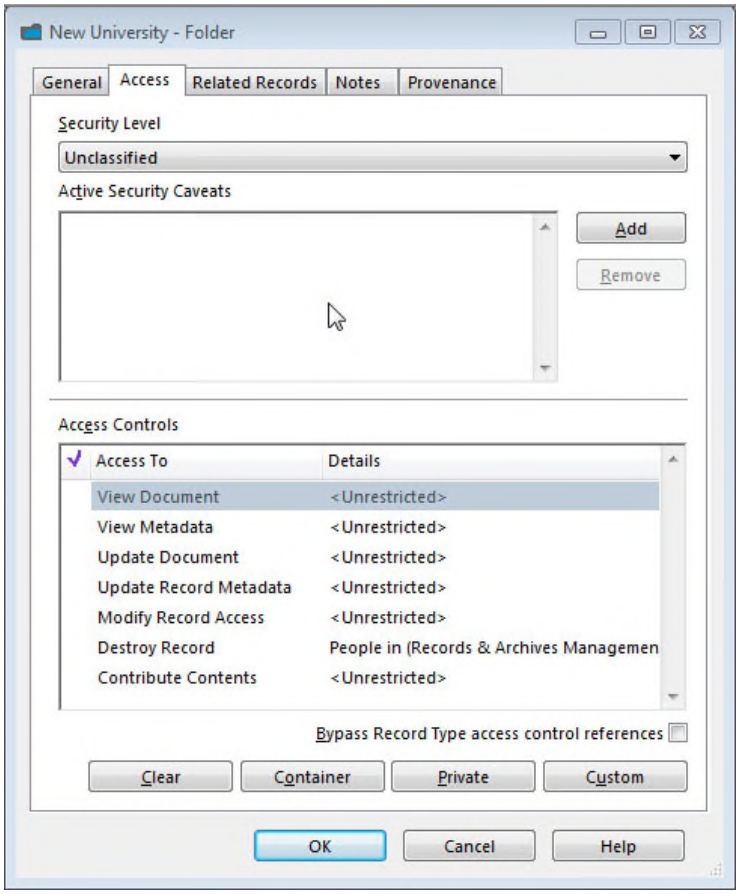

***Note**: Do Not Click OK yet. Mandatory fields **GDA** and **Physical Folder?** Must be completed before moving to the **Access Tab***



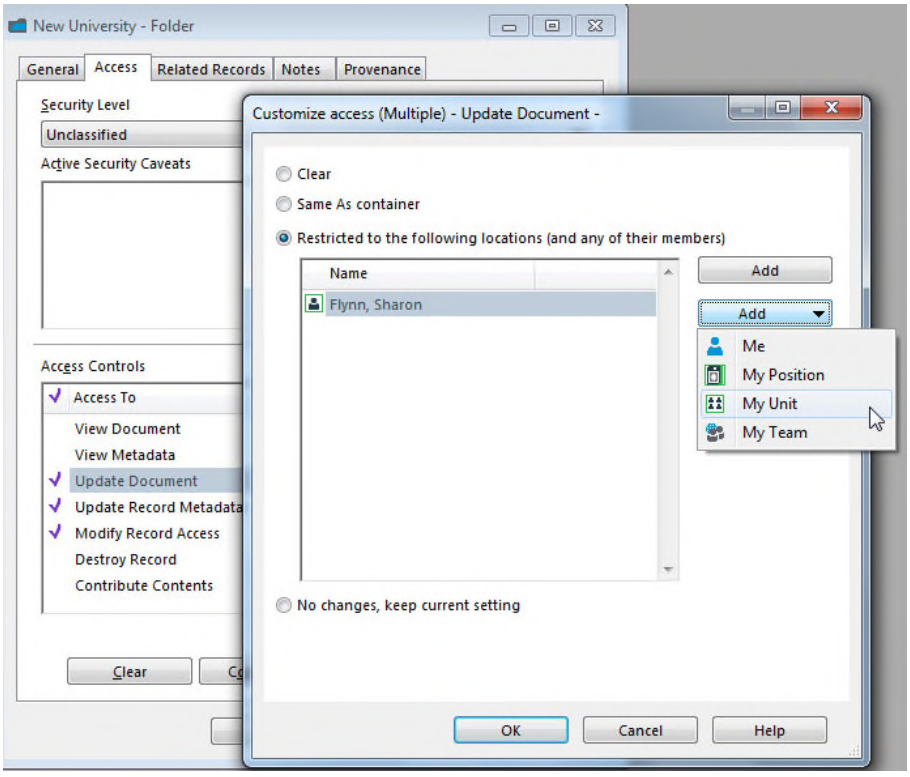

Explanatory notes about the use of Access Controls can be found in the table on the following page….

| | |
|---|---|
| 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 *(that is, information about the record)* 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.<br><br>If an Organisation is selected, then all persons within that organisation will have access to the record.<br><br>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. | |

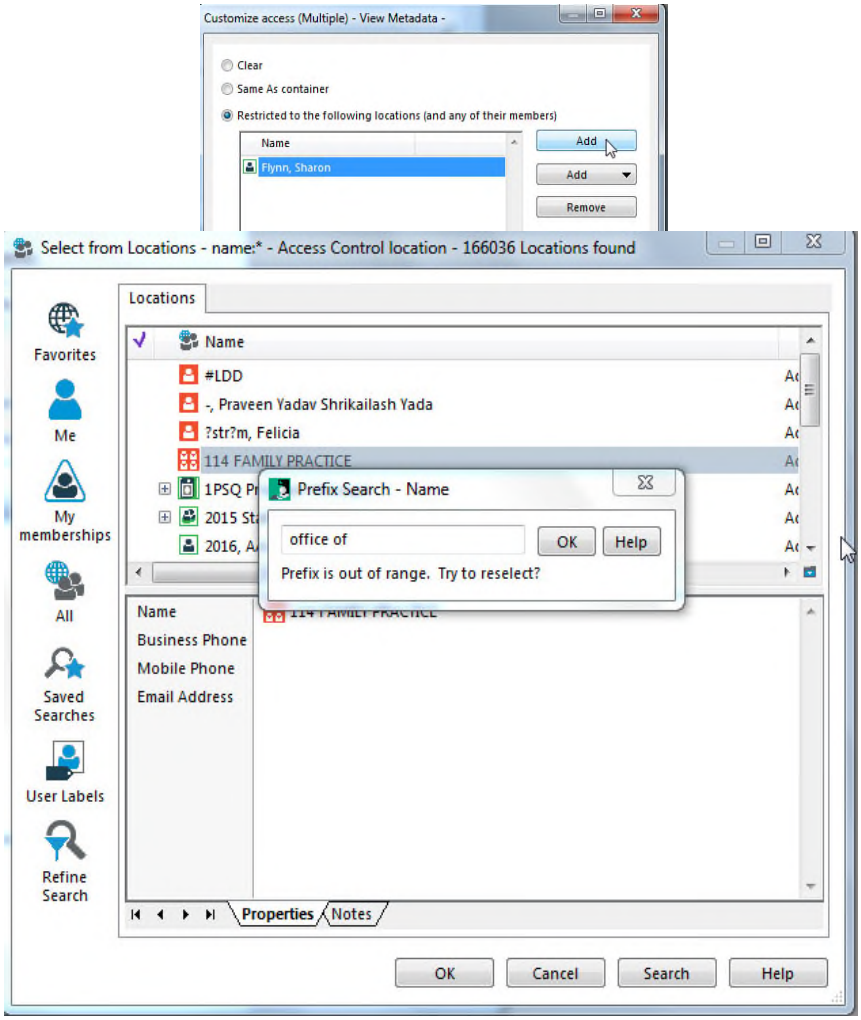
Tag the **Tasks** you wish to restrict access to, click **Custom.**



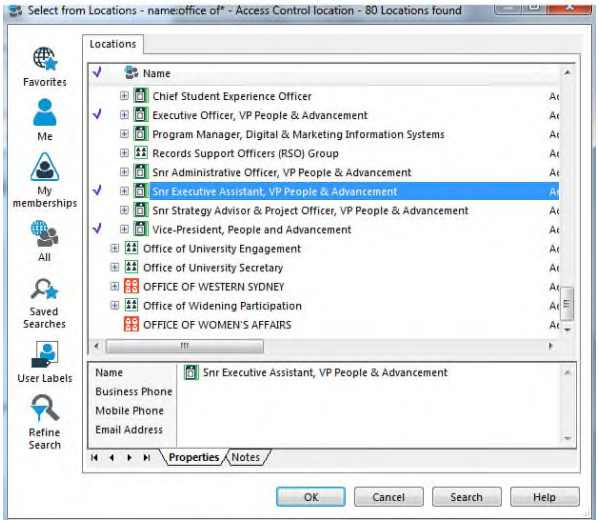

To restrict access to your business unit, **Add ▼ – My Unit** (remove your name)

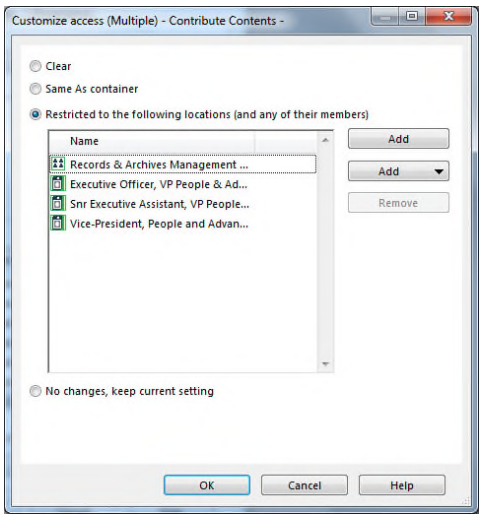


To restrict access to others outside your Unit, **Add –** then **Search** from the locations list (Green icons represent internal staff, positions, business units. Red icons represent external people and organisations – including students).

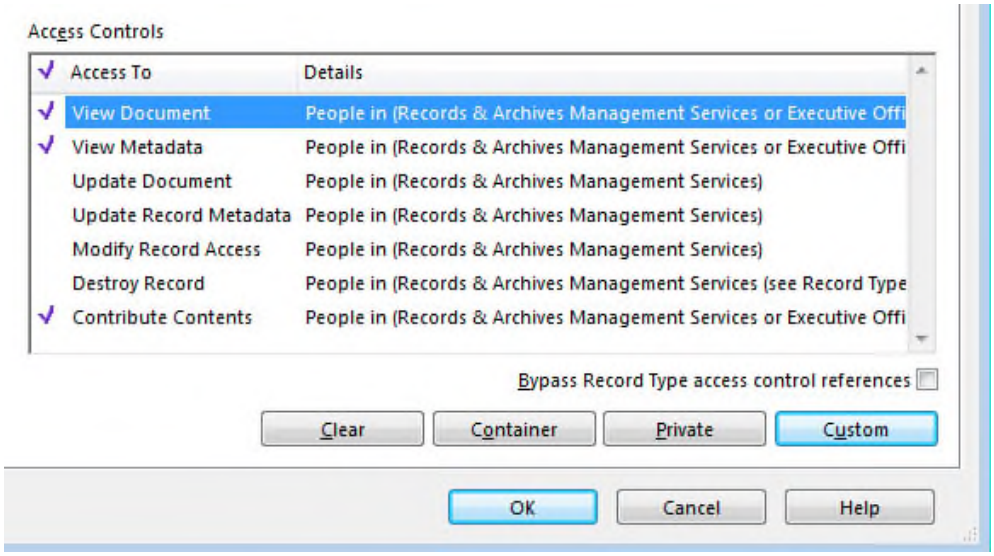


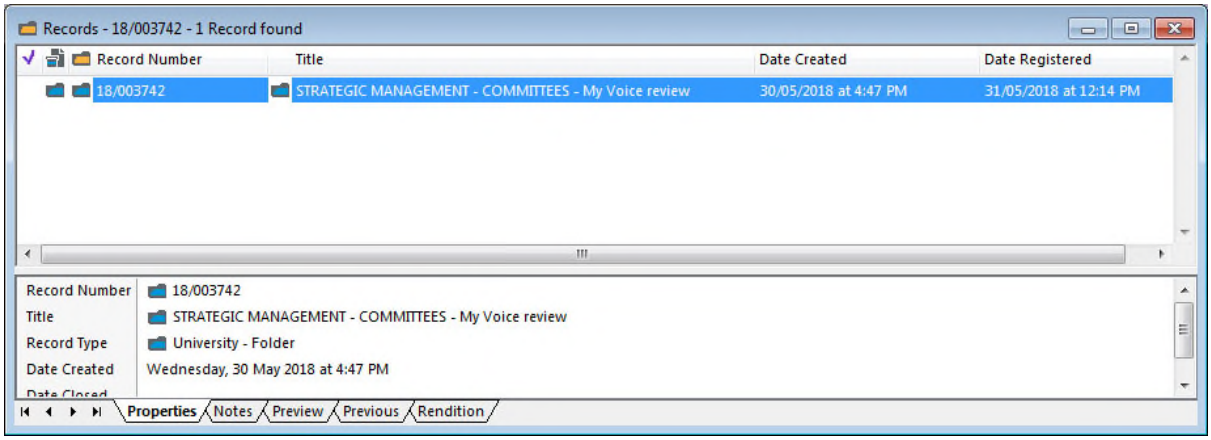

***Note:*** *You can tag multiple organisations/positions to add in bulk, click* ***OK***



The final Access Controls will look something like this.




Click OK to create your new folder.