Sub-folders are used to group similar activities together under a parent folder. This may be used for committee folders where a sub folder is created for each meeting, a project folder where sub folders are created for activities such as tender documentation, drawings, reports etc., or where legal advice sub folders define the subject of the request for advice within a business unit.

Separate sub-folder Record Types have been created and include:

- **Sub Folder** – created to define a group of information e.g. case folder, project etc. that is not already defined in the categories below.
- **Legal Advice Sub Folders** – created to define legal advice subject per business unit.
- **Committee Meeting Sub folders** – created to identification of meeting dates.

The following sub-folder Record Types are no longer utilized but are searchable.

- **Accommodation Services Sub folder** – for use in separating similar groups of information together such as regional or client cases.
- **Project Sub Folder (Acc Serv)** – for use in grouping separate activities involved in project management
- **Project Sub Folder (AMS)** - for use in grouping separate activities involved in projects

Before creating a new sub folder, check that one has not already been created.
How to create a Sub Folder

1. From TRIM, select File New or click the icon under File and then select the appropriate sub folder record type. Click OK. (Check default access restrictions for sub folders as they may need to be amended).

2. Fill in the Sub Folder entry form and link to parent folder by using the Kwikselect button. Confirm number and the sub folder will be created. (Note: Do not enclose the sub-folder in the parent folder if you have a hardcopy record unless it is being stored in the same location)

How to create a Sub Folder on the Fly

You may create new record types including sub folders whilst in entry forms or whilst creating linked folders in Outlook or your directory (document queues). For this example I have used linking a folder in Outlook.

1. From the Create Link menu item, select the Record Type and Container Kwikselect button to select the appropriate record type and container (folder).
2. Check if sub folder has been already been created under the parent folder, if not available Right Click > New and the following options will be presented. Untick the box and select the new record type for the sub folder.

3. Fill in the Sub Folder entry form and link to parent folder by using the Kwikselect button as shown in Step 1.