Legal Advice that is sought from each Section/Division/Faculty/Institute has two parent folders that contain subfolders which are created for each matter. The parent folders are split into two classifications, e.g.

**LEGAL SERVICES – ADVICE – Asset Management Services**

**LEGAL SERVICES – ADVICE – Contracts – Asset Management Services.**

Subfolders are listed under the parent folder, e.g.

**LEGAL SERVICES – ADVICE – Contracts – Asset Management Services**

- Building B lease agreement
- Building C landscaping contract

Subfolders take on the same number as the parent folder but is followed by a sequential number, e.g.

99/0068-04/99

(Parent Number – part number/subfolder number)

**Security/Access Control**

These folders and subfolders contain documents that have Legal Professional Privilege applied so require a security profile that consist of a **Security Level** of CONFIDENTIAL and a mandatory **Access Control Group**. For Parent folders specified for contracts a security caveat of Commercial in Confidence is added to the security profile.

The Access Control Group is called **Legal Advice Access Group** whose members have been determined by the Legal Office. Added to the Access Control Group is the Business Unit who has initiated the request, e.g. Asset Management Services.

Additional caveats such as Confidential-in-Confidence still apply for those documents that fall into that category.
Subfolders have been set up with a default Access Control and Copy Style as follows:

Subfolders will need the same Security & Access Controls as those held by the parent container (folder) so you will need to add the Organisational Unit to the View Document & View Metadata options and select the Bypass Record Type access control references.

Documents take on the Security and Access control of Container (sub-folder).
How to create subfolders

Legal Advice Subfolders will be created for each legal matter to aid easy retrieval.

1. Go to the Parent folder and check that a legal matter sub-folder hasn’t already been created.

2. If not right click Select New Record.

3. Untick the “Contain new Record within File” box and select Legal Advice Subfolders

4. Fill in Record Entry Form and select Container Number (Folder Number)

5. Parent Folder – Sub-Folder (legal matter) – Document structure looks like this example

Refer to

INT09/5694 TRIM Cheat Sheet 37 – Creating links Outlook folders with TRIM folders – used with Record Type Legal Auto Process of legal matter emails.