



Finalising & Closing Records

Finalising records (Word, Excel, PDF, E-mails, Notes etc.) in TRIM ensures the record can no longer be edited and no further revisions can be made.

To finalise a record:

1. Right click on the record → **Electronic** → **'Final'**
2. Select **Final** from the declaration selection → click **OK**

A screenshot of the 'Make Final - D17/94256' dialog box. The dialog box has a title bar with the text 'Make Final - D17/94256'. Inside, there is a text area with the following text: 'This function allows you to finalize a Record. An unfinalized Record is a draft in progress. A finalized Record cannot be routinely changed and can have no further Revisions created.' Below this, there is a section labeled 'Declare As:' with three radio button options: 'Draft/Working Document', 'Final' (which is selected and highlighted with a red box), and 'Final and remove any previous Revisions:'. At the bottom, there is a text input field with the placeholder text '<Enter an update comment for the audit log>'. Below the input field, there are three buttons: 'OK' (highlighted with a red box), 'Cancel', and 'Help'.

Closing a file prevents users from adding further documentation to a file. File should be closed when they are no longer active records for you. By closing a record you will identify to Records Governance Services that the file can be made inactive in the system and this will begin its retention lifecycle in accordance with NSW State Records General Retention requirements.

To close a record:

1. Right click on the record → **Details** → **'Dates'**
2. Select the **'Date Closed'** box which will automatically populate today's date and time → Click **OK**

A screenshot of the 'Record Dates - 10/1365/4' dialog box. The dialog box has a title bar with the text 'Record Dates - 10/1365/4'. Inside, there is a table with the following data:

Date Created	16/02/2012	12:49:44 PM
Date Registered	16/02/2012	12:50:02 PM
<input checked="" type="checkbox"/> Date Closed	28/09/2018	10:49:17 AM
Date Due		
Date Published		
Last Action Date	26/09/2018	3:50:42 PM

The 'Date Closed' row is highlighted with a red box. Below the table, there is a text input field with the placeholder text '<Enter an update comment for the audit log>'. At the bottom, there are three buttons: 'OK' (highlighted with a red box), 'Cancel', and 'Help'.

TRIM will confirm the record has been closed.