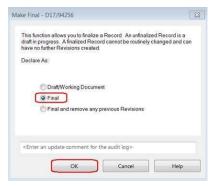# Finalising & Closing Records

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.
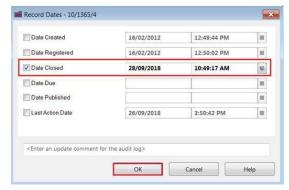
To finalise a record:

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

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 File should be closed when they are no longer active records for you.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 todays date and time → Click **OK**

TRIM will confirm the record has been closed.