

Checking In Documents Manually

When editing documents directly from TRIM9, the document will open in its native application (e.g. Microsoft Word) and will automatically be '**Checked Out**' from TRIM, as shown by the 'Edit Status' field in the **View Pane**:

Record Number	D20/34775
Title	Example Document - TRIM9 Quick Reference Guide Creation
Container	20/516: INFORMATION MANAGEMENT - IMPLEMENTATION - TRIM9 Upgrade
Alternative container	
Related records	Copy of: D20/34427: Example Document - TRIM9 Quick Reference Guide Creation
Creator	Bryce Rheinberger
Author	Bryce Rheinberger
Date Written (Created)	Monday, 1 June 2020 at 4:05 PM
Date Registered	Wednesday, 3 June 2020 at 4:19 PM
Date Modified	Monday, 1 June 2020 at 4:05 PM
Edit Status	Checked Out
Checked Out To	Bryce Rheinberger
Checked Out On	Wednesday, 3 June 2020 at 4:21 PM
Revision Number	1

When a record is '**checked out**' it is unable to be edited by other users and the user can only view the last version that was checked in (not the version currently checked out). It is important to check in documents to:

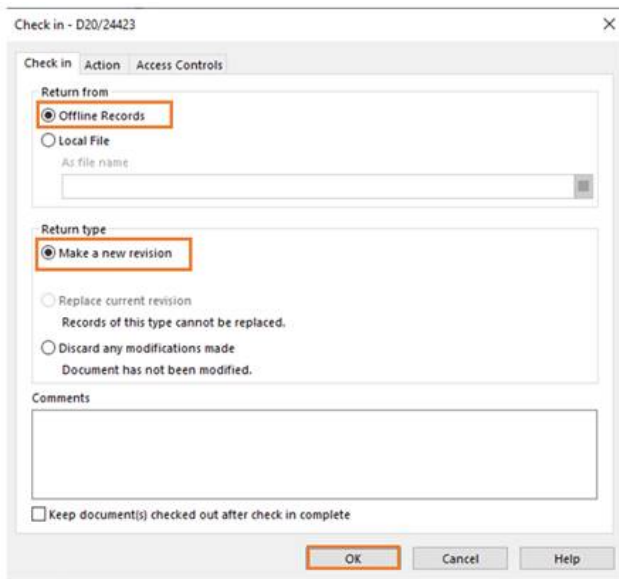
- ensure other staff have access to the most current version when not being worked on, and
- ensure changes you have made to a document are not lost as a result of an Administrator checking in a document.

Once you have finished editing the document, click **Save** and close the document. The document should check back in automatically. (You will notice the **Revision Number** will increase by one, and the **Edit Status** will change back to '**Checked In**',

Edit Status	Checked In
Checked Out To	
Checked Out On	
Revision Number	2

Occasionally you may find that the 'Edit Status' will remain '**Checked Out**' (a TRIM error message shortly after you have closed a record is a good indication this has occurred). You can force the check in by:

Right-click the document → **Check In** → select **Offline Records** → Select **Make a new revision** → Click **OK**



Check in - D20/24423

Check in | Action | Access Controls

Return from

☒ Offline Records

☐ Local File

As file name

Return type

☒ Make a new revision

☐ Replace current revision

Records of this type cannot be replaced.

☐ Discard any modifications made

Document has not been modified.

Comments

☐ Keep document(s) checked out after check in complete

OK Cancel Help

It is recommended to regularly run a search to check if any documents have inadvertently remained checked out.

Locate documents that you may have 'checked out' by clicking the **Documents Checked Out** button on the 'Trays' tab of the Shortcut bar



Follow the directions above to check documents in.