

CHECKING IN DOCUMENTS MANUALLY

When editing documents directly from TRIM, 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	D21/49433
Title	Tips & Tricks - Check In Documents
Container	17/3709: TEACHING - COURSE DELIVERY - Resources & Working Papers - Tips and Tricks - PDF Versions
Creator	Janine Kennedy
Author	Kennedy, Janine
Date Written (Created)	Friday, 26 February 2021 at 3:51:29 PM
Date Registered	Friday, 26 February 2021 at 3:52:42 PM
Date Modified	Friday, 26 February 2021 at 3:51 PM
Edit Status	Checked Out
Checked Out To	Kat Withnell
Checked Out On	Friday, 6 December 2024 at 12:54 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:

1. Right-click on the record which is checked out and select **Check In**
2. Select **Make a new revision** if you made changes you would like to save. Select **Discard any modifications made** if you didn't make any changes to the document, or you did make changes, but you don't want to save them:

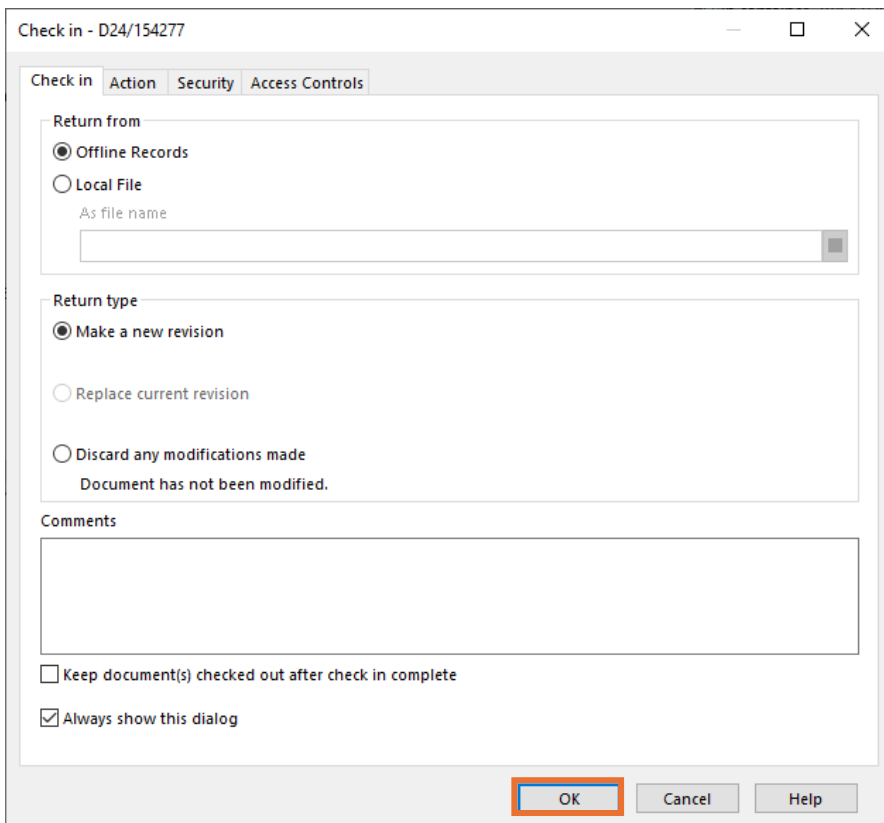
Return type

Make a new revision

Replace current revision

Discard any modifications made
Document has not been modified.

3. Select **OK** to finish checking the record back in:



It is recommended to regularly run a search to check if any documents have inadvertently remained checked out to you. You can locate documents that you may have checked out by clicking the **Documents Checked Out** button on the **Trays** tab of the Shortcut bar. Then, follow steps 1 to 3 above to check the record(s) back in:

