

Viewing Records

There are a few different ways to view a record (Word document, Excel spreadsheet, PDF, email, photo etc.) in TRIM. All these methods are detailed below to assist you in determining your preferred method for viewing records:

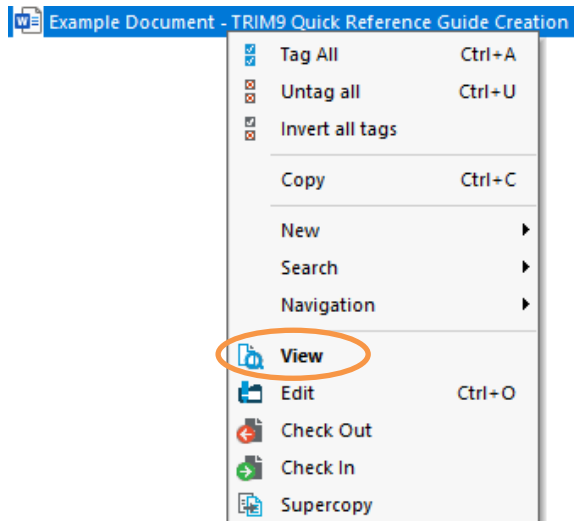
1. Locate the record which you want to view.
2. Refer methods below:

Method 1

- Double-click the record to view it.

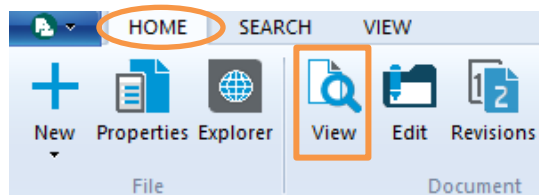
Method 2

- Right-click the record and select **View**:



Method 3

- Click on the record once to select it. Then select the **HOME** tab, and then click the **View** button:



Revisions Explained

Revisions are modified copies of a TRIM document.

When you modify/edit a document and save that updated document to TRIM, there isn't a new record which gets created, but instead the updated document gets saved on top of the previous copy of that document.

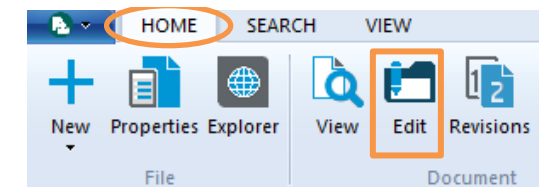
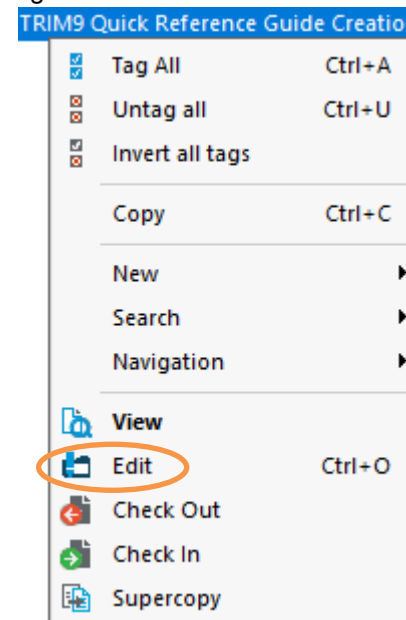
The current copy of a particular document is known as the Current Revision. All previous/old copies of that particular document are known as Previous Revisions.

How to Edit a Document

In this Quick Reference Guide, the term document is used to refer to many different file types such as Word documents, Excel spreadsheets, PowerPoint presentations and PDF. To edit a document in TRIM:

1. Locate the record which you want to edit.
2. Choose your preferred method from the two listed below, and perform the associated steps for that method:

Right-click on the record and select **Edit**: Click on the record once to select it. Then select the **HOME** tab, and then click the **Edit** button:



- 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 Type	ELECTRONIC DOCUMENT
Record Number	D20/34775
Title	Example Document - TRIM9 Quick Reference Guide Creation
Container	20/516: INFORMATION MANAGEMENT - IMPLEMENTATION - TRIM9 Upgr:
Alternative container	
Related records	Copy of: D20/34427: Example Document - TRIM9 Quick Reference Guide Cre:
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
Number of Pages	
Document Details	Checked out to Offline Records on 'CCH239-1DZ3PV2.newcastle.edu.au

Hint: The 'Checked Out To' and 'Checked Out On' fields in the **View Pane** will tell you when the document was checked out, and who checked it out.

- Work on the document the same as you would if you were working from your desktop or shared drive. Once you have finished editing, save the document and close.
- The document will check back in automatically. You will notice that 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

Hint: To access previous Revisions of a record:

- Click on the record once to select it. Then select the **HOME** tab, and then click on the **Revisions** button:

