


Changing the Title of a Record






You can change the title of a record (Cabinet, Folder, Sub-Folder, Document, Email etc.) if you have made an error or you need to add additional information.

To change the title of a record in the TRIM9 Web Client:

1. Locate the record for which you want to change the title.
2. Ensure the options for the record such as UPDATE, NEW, LOCATIONS etc. are displayed. If not, click on the record number once to display them:

 **D20/34427**


DOCX Example Document - TRIM9 Quick Reference Guide Creation

UPDATE NEW   LOCATIONS  REQUEST  DETAILS 






ASSIGNEE

In container '20/493 (Records Governance Services (RGS))' since Tuesday, April 7, 2020 at 4:17 PM

3. Click the **UPDATE** button:

 **D20/34427**

DOCX Example Document - TRIM9 Quick Reference Guide Creation

UPDATE NEW   LOCATIONS  REQUEST  DETAILS 

ASSIGNEE

In container '20/493 (Records Governance Services (RGS))' since Tuesday, April 7, 2020 at 4:17 PM

4. The Record Entry Form for that record will display. The 'Title' field should display towards the top of the Record Entry Form (but depending on which record type you are changing the title for, may not always be the first field):

RECORD NUMBER: D20/34427

GENERAL

Title (Free Text Part) (Required)

Example Document - TRIM9 Quick Reference Guide Creation

5. Update the 'Title' field as required, then select **SAVE** to save the changes:

GENERAL

Title (Free Text Part) (Required)

Example Document - TRIM9 Quick Reference Guide Creation - Update to Title

Container (Required)

 20/493


Date Written (Created) (Required)

20/03/2019 2:21 PM

External ID

☐ Physical Original Executed Agreement Received

Alternative container

 < Enter Search Query >

☒ Enclosed?

NOTES

SAVE

CANCEL