

## Revisions Explained

Revisions are modified copies of a document.

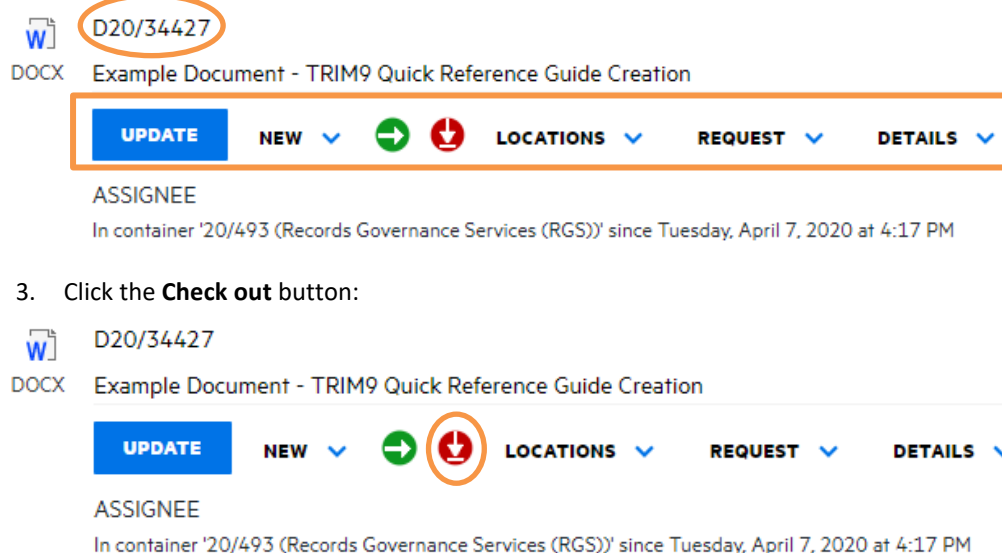
When you modify/edit a document and save that updated document to TRIM9, there isn't a new record which gets created, but instead the updated document gets saved on top of the previous copy of that document.

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 the TRIM9 Web Client:

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



D20/34427

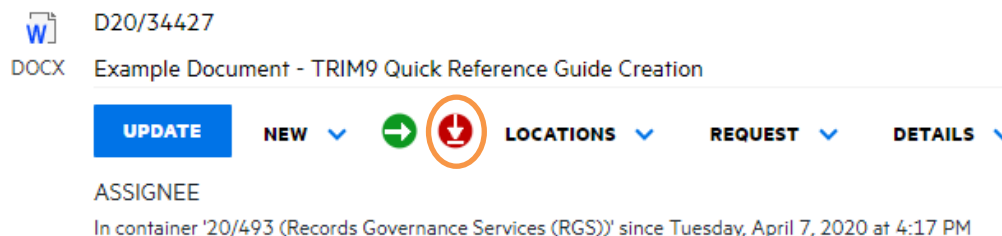
DOCX Example Document - TRIM9 Quick Reference Guide Creation

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 **Check out** button:



D20/34427

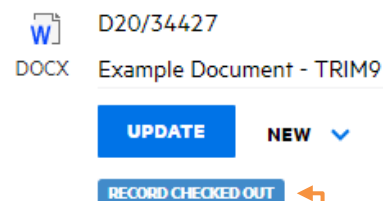
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UPDATE NEW LOCATIONS REQUEST DETAILS

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4. The Edit Status of the document will change to Checked Out:



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DOCX Example Document - TRIM9

UPDATE NEW

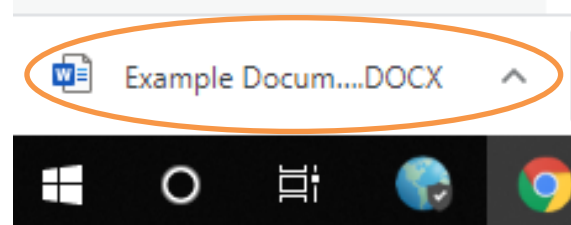
RECORD CHECKED OUT

**Note:** The above 'RECORD CHECKED OUT' pop up will display briefly to indicate that the record has been successfully checked out.

**Hint:** You can check at any time if a particular record is checked out by clicking on the **Hide/show the Properties Panel** button on the right of the TRIM9 Web Client screen, and checking the 'Edit Status' field to see if it states the record is 'Checked Out':

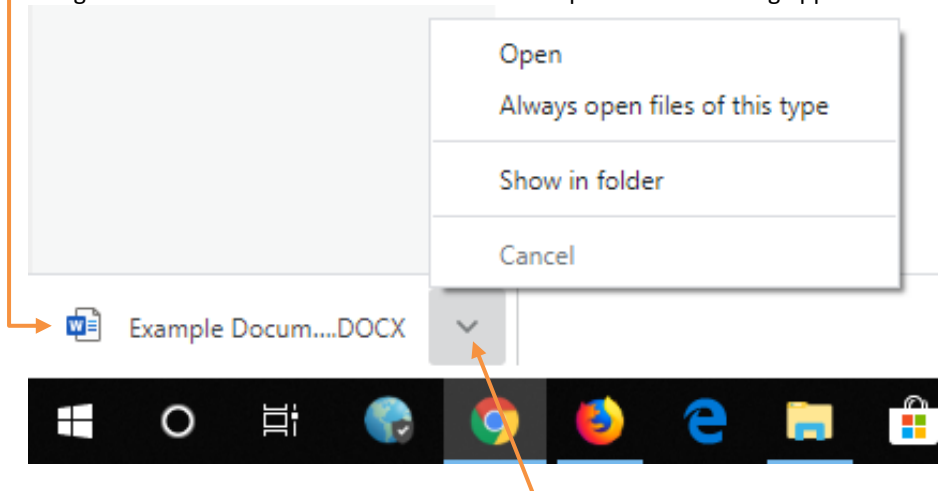
Edit Status:  
Checked Out

5. The document will be downloaded to your local computer (where the document downloads to and how you access it may differ depending on the browser you are using and your download settings, however using Google Chrome (recommended) the document will download to your 'Downloads' folder on your computer and be available for you to open at the bottom left of your Google Chrome window as shown below):



**Hint:** Alternatively you will be able to access it in your 'Downloads' folder on either a PC or a Mac.

6. If using Google Chrome, if you click on the document itself at the bottom left of your Google Chrome window then the document will open in its authoring application:



Alternatively, if you click on the drop-down arrow as shown above you will be given three options:

**Open** : Will open the document in its authoring application,

**Always open files of this type** : Changes your Google Chrome settings so that next time you download a file of this type it will automatically open,

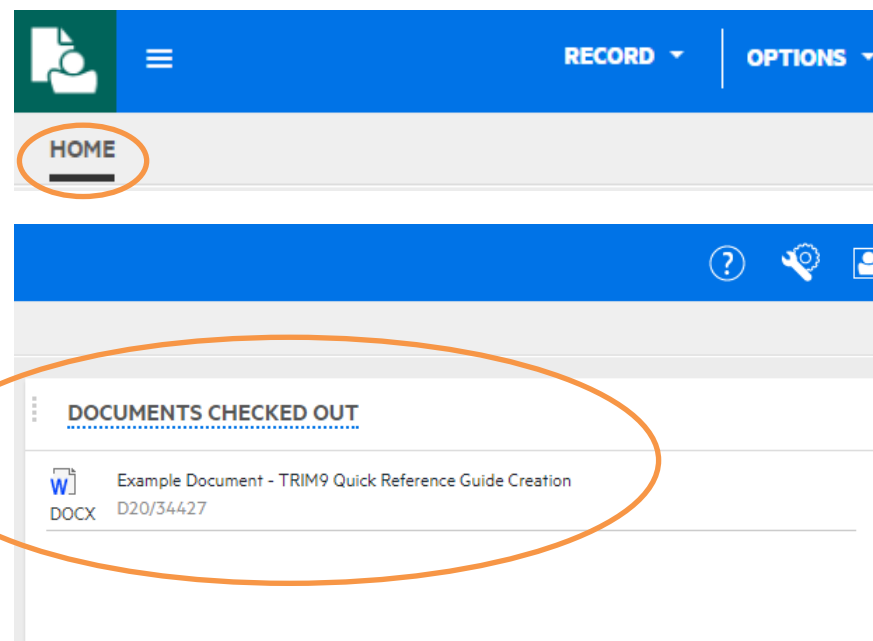
**Show in folder** : Will open your 'Downloads' folder and highlight the recently downloaded document for you. From here you can open it, or perhaps drag and drop it to your desktop for easier future access.

7. Edit the document as required. Once finished editing, save and then close the document.

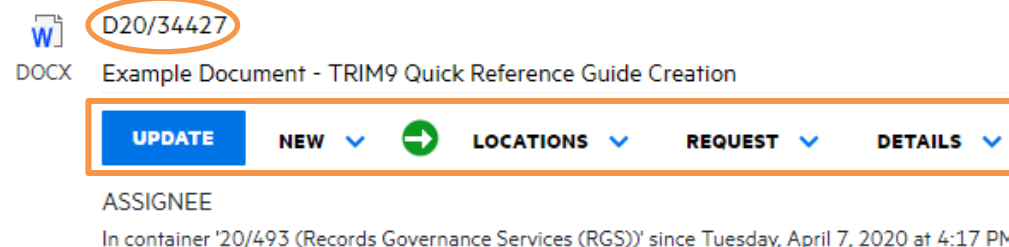
**Note:** If business process or circumstance requires you to have the record checked out for some time, please be aware that while you have the record checked out, colleagues will be unable to edit the record themselves (paramount for version control), and will also be unable to view any changes you have made to the record since you checked it out.

8. When you are ready to save your updated document back into TRIM9, first locate the record in the TRIM9 Web Client.

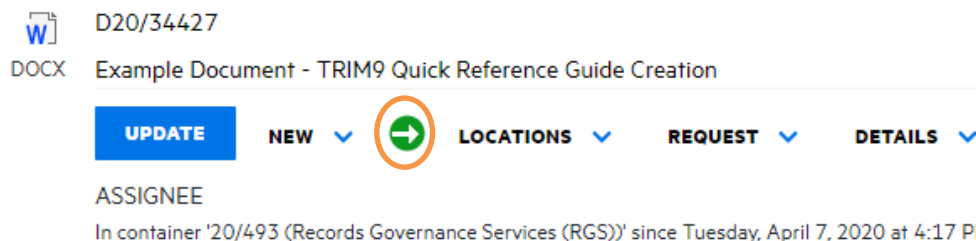
**Hint:** If it has been some time since you checked out the document, an easy way to locate it in the TRIM9 Web Client is to select the **HOME** button and look for it in your 'DOCUMENTS CHECKED OUT' dashboard item:



9. Once you have located it, 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:



10. Click the **Check In** button:



DOCX D20/34427  
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 P


11. The **'CHECK IN RECORD'** window will appear. Under the **Attach electronic document** area either drag and drop your updated document into the space provided, or click in the space provided to open File Explorer (Windows PC) or Finder (Mac) in order to browse to and select your updated document:

## CHECK IN RECORD

Record Number D20/34427  
☐ Keep checked out  
☒ Make a new revision  
☐ Discard any modifications made

Comments

Attach electronic document



Click here or Drag and Drop to upload files

**CHECK IN** CANCEL


12. In the **'CHECK IN RECORD'** window you will now notice that the updated document has now been uploaded. Select **CHECK IN**:

## CHECK IN RECORD


Record Number D20/34427  
☐ Keep checked out  
☒ Make a new revision  
☐ Discard any modifications made

Comments

Attach electronic document

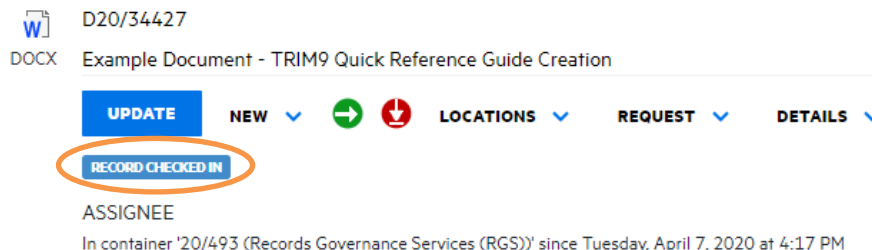


Click here or Drag and Drop to upload files

 Example Document - TR...  
11.77 KB  
100%

**CHECK IN** CANCEL

13. The below **'RECORD CHECKED IN'** pop up will display briefly to indicate that the record has been successfully checked in:






DOCX D20/34427  
Example Document - TRIM9 Quick Reference Guide Creation


**UPDATE** NEW ▾ **→** **↓** LOCATIONS ▾ REQUEST ▾ DETAILS ▾

**RECORD CHECKED IN**

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

**Hint:** If you want to be sure the document has been checked back in, click on the **Hide/show the Properties Panel** button  on the right of the TRIM9 Web Client screen, and check the 'Edit Status' field to see if it states the record is 'Checked In'. The 'Revision Number' should have also increased by one:

  **SELECT PROPERTIES**

 **ELECTRONIC DOCUMENT**

Record Type:  
ELECTRONIC DOCUMENT

Record Number:  
D20/34427

Title:  
Example Document - TRIM9 Quick Reference Guide Creation

Container:  
[20/493: INFORMATION MANAGEMENT - IMPLEMENTATION - Test Folder](#)

Alternative container:

Related records:

Creator:  
[Bryce Rheinberger](#)

Author:  
[Bryce Rheinberger](#)

Date Created:  
Wednesday, March 20, 2019 at 2:21 PM

Date Registered:  
Tuesday, April 7, 2020 at 4:17 PM

Date Modified:  
Tuesday, April 28, 2020 at 9:46 AM

Edit Status:  
Checked In

Checked Out To:

Checked Out On:

Revision Number:  
2