

### Revisions Explained

Revisions are modified copies of a document.

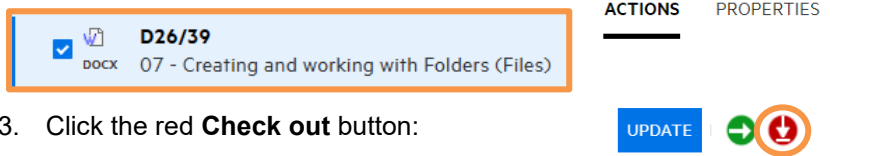
When you modify/edit a document and save that updated document to TRIM, there isn't a new record which gets created, but instead the updated document gets saved on top of the previous copy of that document.

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, and create a new revision

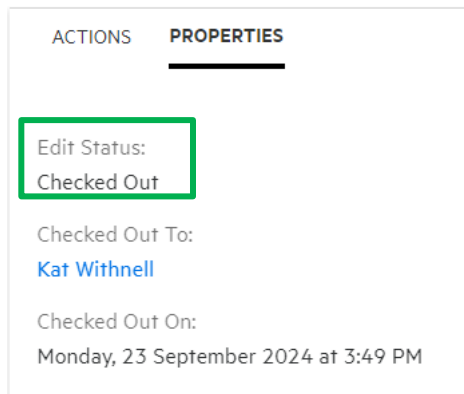
In this Quick Reference Guide, the term document is used to refer to many different file types such as Word documents, Excel spreadsheets, PowerPoint presentations and PDF. To edit a document in the TRIM Web Client:

1. Locate the document which you want to edit.
2. Tick the box next to the record or click on the record number once to display the options for the record such as ACTIONS, PROPERTIES, UPDATE etc. on the right-hand side of your screen:



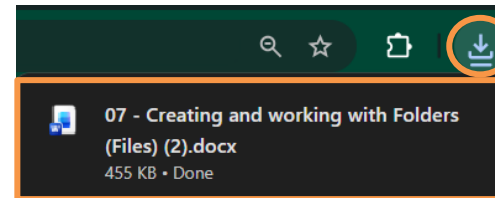
3. Click the red **Check out** button:

4. The red Check out button will disappear to indicate that the record has been successfully checked out. The **Edit Status** of the document will change to **Checked Out**, which can be viewed by clicking on **PROPERTIES**:



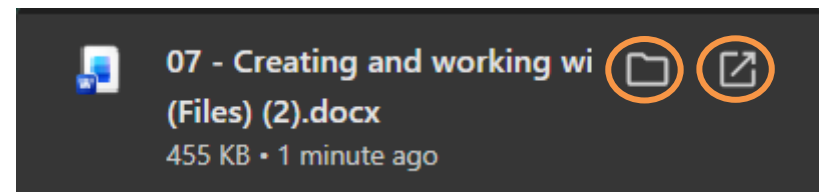
**Hint:** You can check at any time if a particular record is checked out by clicking on **PROPERTIES** on the right of the TRIM Web Client screen, and checking the **Edit Status** field to see if it states the record is **Checked Out**.

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 if using Google Chrome, the document will download to your 'Downloads' folder on your computer and be available for you to open at the top right 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, you will have the option to either:
  - a. Show in folder: Will open your 'Downloads' folder and highlight the recently downloaded document for you. From here, you can open it or move it to your desktop for easier future access; or
  - b. Open: This will depend on your default app settings, as to whether it will open in the browser, or in the authoring application.




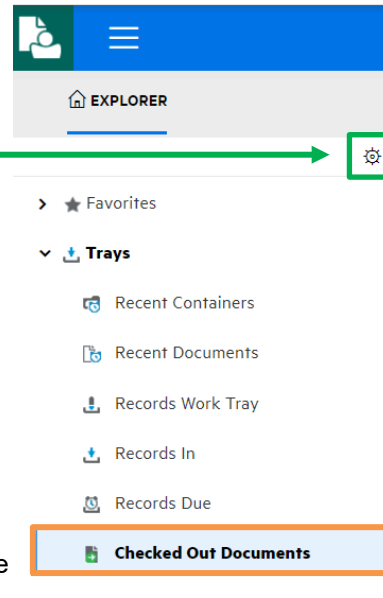
7. Edit the document as required. Once finished editing, save and then close the document.

**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.

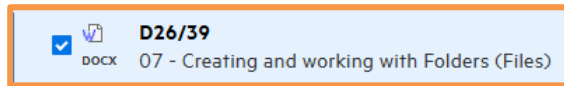
EDITING, CHECKING IN, REVISIONS AND VERSION CONTROL IN THE TRIM WEB CLIENT

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

**Hint:** If it has been some time since you checked out the document, an easy way to locate it in the TRIM Web Client is to select the 'Trays' button from the Navigation Pane and look for it in your 'Checked Out Documents' tray. You may need to add this to your Trays via the  icon which is located in the top right-hand corner.



9. Once you have located it, Tick the box next to the record or click on the record number once to display the options for the record such as ACTIONS, PROPERTIES, UPDATE etc. on the right-hand side of your screen.

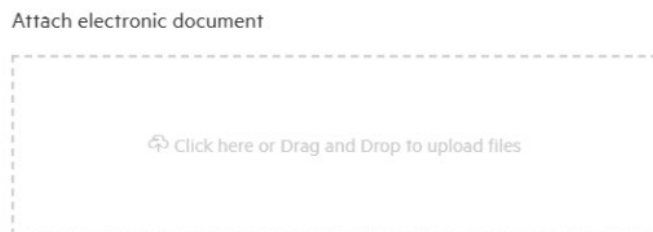


**ACTIONS** | **PROPERTIES**

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

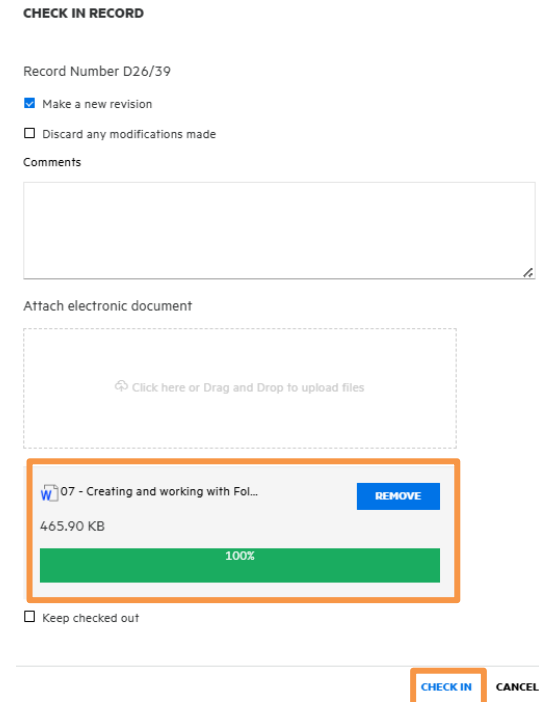
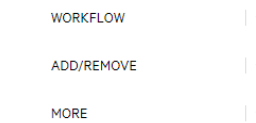


11. The '**CHECK IN RECORD**' window will appear. Under the **Attach electronic document** area either drag and drop your updated document into the space provided, or click in the space provided to open File Explorer (Windows PC) or Finder (Mac) to browse to and select your updated document:

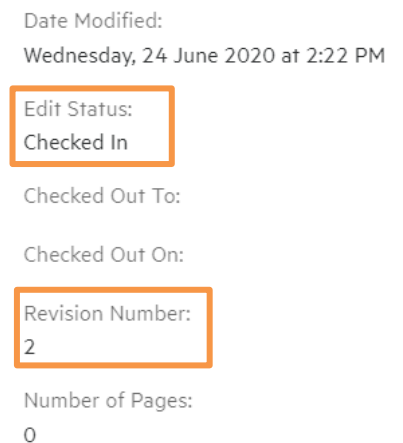


12. In the '**CHECK IN RECORD**' window you will now notice that the updated document has now been uploaded. Select **CHECK IN**:

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



**Hint:** If you want to be sure the document has been checked back in, click on **PROPERTIES** on the right of the TRIM 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:



### Creating a new revision by promoting a revision

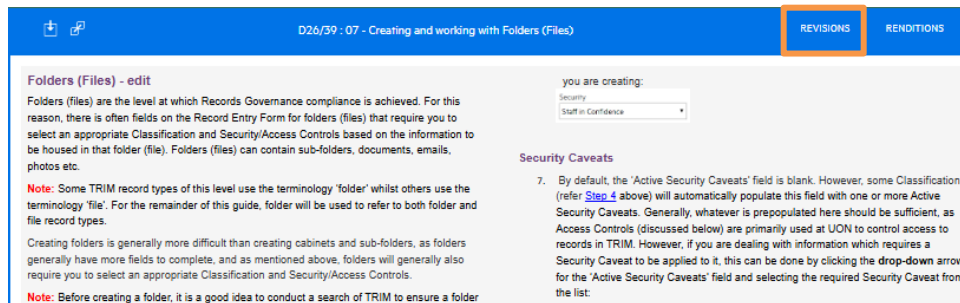
If a TRIM document has more than one Revision, it is possible to promote a Previous Revision so that it becomes the Current Revision. For example, you may need to do this if changes had been made to a document which were incorrect, and you therefore wanted to roll back to a Previous Revision of the document from prior to when the incorrect changes had been made.

To promote a Revision:


1. Locate the document for which you want to promote a Revision.
2. On the selected record, click on the particular records file type icon:

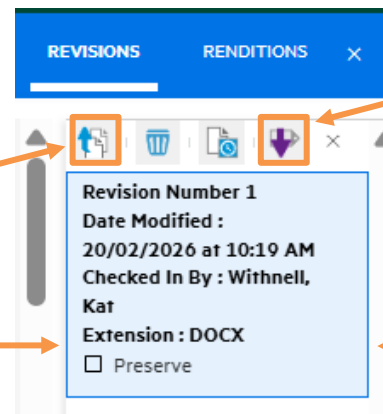


3. On the Preview panel, click **Revisions**. The Revisions panel will open, displaying all Revisions associated with the record.



4. On the list of Revisions, click the Revision you want to promote to highlight it. The Preview panel will update and display the content of the selected Revision.

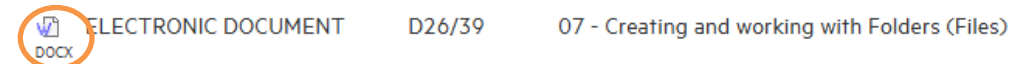
5. Click **Promote the selected Revision**  and the selected Revision will become the new current Revision, and the original document will become a Revision.



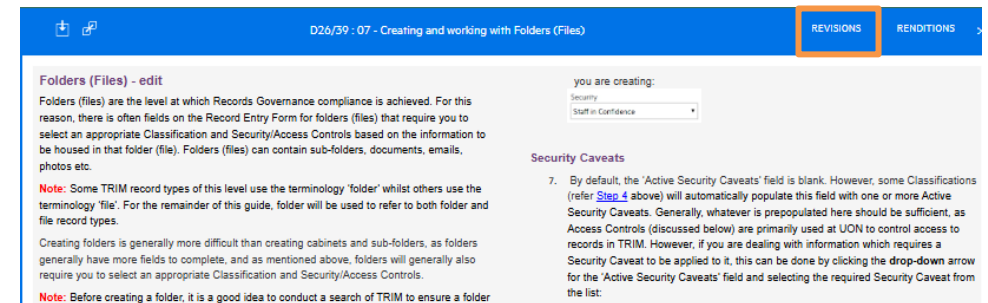
### Accessing previous revisions

To access previous Revisions of a record:

1. Locate the document for which you want to access the Previous Revisions.
2. On the selected record, click on the particular records file type icon:



3. On the Preview panel, click **Revisions**. The Revisions panel will open, displaying all Revisions associated with the record.



4. To view a previous revision, on the list of Revisions, click the Revision you want to view. The Preview panel will update and display the content of the selected Revision.

5. To download a revision, click the Revision you want to download. The Preview panel will update and display the content of the selected Revision.

6. Click **Download** 

**Note:** 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 if using Google Chrome, the document will download to your 'Downloads' folder on your computer and be available for you to open at the top right of your Google Chrome window). See [Quick Reference Guide – Viewing and downloading documents in the TRIM Web Client](#) for additional guidance.

### Checking in without making a new revision

There may be instances where you have checked out a document intending to edit it but then didn't actually make any changes. The 'Edit Status' and 'Checked Out To' fields in the **PROPERTIES Pane** will show you if a document is checked out to you:

Should you need to check in a document which is currently checked out to you, but you don't want to update the document in TRIM, below are instructions on how to do so:

ACTIONS **PROPERTIES**

Checked Out To:  
Kat Withnell


Checked Out On:  
Friday, 20 February 2026 at  
1:11 PM

Revision Number:

2

1. Locate the document which you want to Check In to TRIM.
2. Tick the box next to the record or click on the record number once to display the options for the record such as ACTIONS, PROPERTIES, UPDATE etc. on the right-hand side of your screen:

**ACTIONS** PROPERTIES

 **D26/39**  
docx 07 - Creating and working with Folders (Files)



3. Click the green **Check In** button:
4. The **CHECK IN RECORD** window will appear. Ensure **Discard any modifications made** is selected, then click **OK**:

#### CHECK IN RECORD

Record Number D26/39

Make a new revision

Discard any modifications made

Comments

Keep checked out

**CHECK IN** CANCEL

5. The 'Edit Status' will change back to **Checked In**, and the 'Revision Number' will remain the same:

ACTIONS **PROPERTIES**

Edit Status:  
Checked In

Checked Out To:



Checked Out On:

Revision Number:  
2

## Versions explained

**Versions** are basically *new* copies of a document for which version control is required. If you create a New Version for a document, by default the Current Revision of that document will become Revision 1 for the New Version of that document.

You can create multiple Versions of a document, and each will be registered as a separate record in TRIM. The Record Numbers for each Version will be the same, except that they will be numbered with [V1], [V2] etc. at the end of the Record Number:

	ELECTRONIC DOCUMENT	D26/37[v1]	05 - Creating and working with Cabinets
	ELECTRONIC DOCUMENT	D26/37[v2]	05 - Creating and working with Cabinets

When you create a New Version for a document, the document which was the Current Version will become Finalised (if it wasn't Finalised already).

## Version control

Many documents require version control, such as standard operating procedures, policies, procedures, externally visible documents, frequently asked questions, etc.

Version control provides the ability to have a Version that is current for general dissemination (Current Version) - but still be able to have Revisions and version control for a document not yet ready for general dissemination against the same record number Version.

**For example**, consider a retail outlet's price list. Day to day, customers will use the current price list. However, at some point, the marketing staff will need to draft next year's price list. For this they create a New Version of the current price list. Each time they work on and update this New Version of the price list in TRIM they will subsequently create a new Revision for it.

So, the Current Version (this year's price list) is actually the currently published Version which translates in TRIM concepts to the most recent Version that was made Final. I.e.:

- The Version that is Finalised and currently being used represents the Current Version in the scenario described above.
- The New Version that has been created but is still being updated and worked on is considered a work in progress until it is Finalised and published.

To assist with working with and navigating to the different Versions of a document:

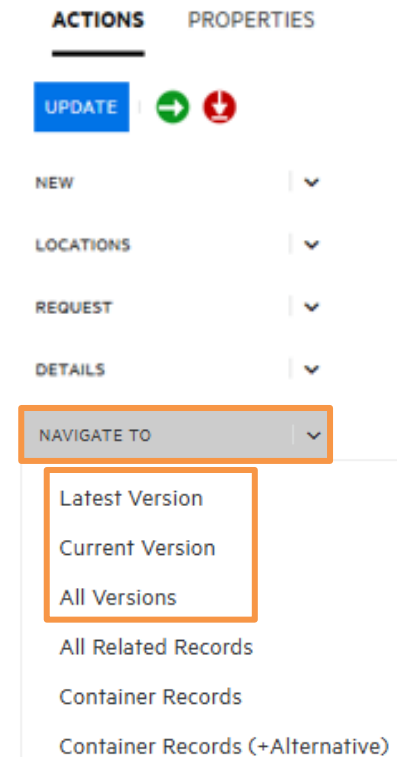
1. Tick the box next to the record or click on the record number once to display the options for the record such as ACTIONS, PROPERTIES, UPDATE etc. on the right-hand side of your screen:
2. Click the **NAVIGATION** drop down, then select your required option:

**All Versions** - will display all Versions regardless of their edit status

**Latest Version** - will display the last Version that has been created regardless of its edit status

**Current Version** - will display the last Version that has a Finalised status

**Note:** Depending on which Version of a document you clicked on, you may not always see all these options listed. E.g. If you click on the Current Version of a document, **Current Version** won't be an option under the **Navigation** menu.

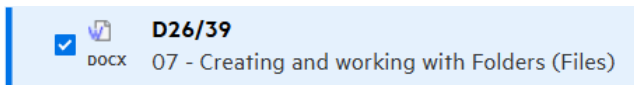


The screenshot shows the right-hand side of the TRIM web client interface. At the top, there are two tabs: 'ACTIONS' and 'PROPERTIES'. Below the 'ACTIONS' tab, there is a blue 'UPDATE' button, a green right-pointing arrow, and a red down-pointing arrow. Below these are several dropdown menus: 'NEW', 'LOCATIONS', 'REQUEST', and 'DETAILS'. The 'NAVIGATE TO' dropdown menu is highlighted with an orange border and is open, showing a list of options: 'Latest Version', 'Current Version', 'All Versions', 'All Related Records', 'Container Records', and 'Container Records (+Alternative)'. The 'NAVIGATE TO' dropdown and its list of options are also highlighted with an orange border.

## Creating new versions

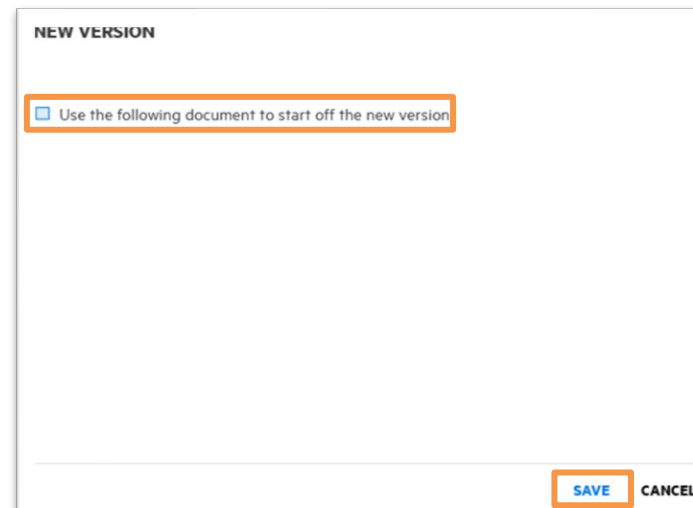
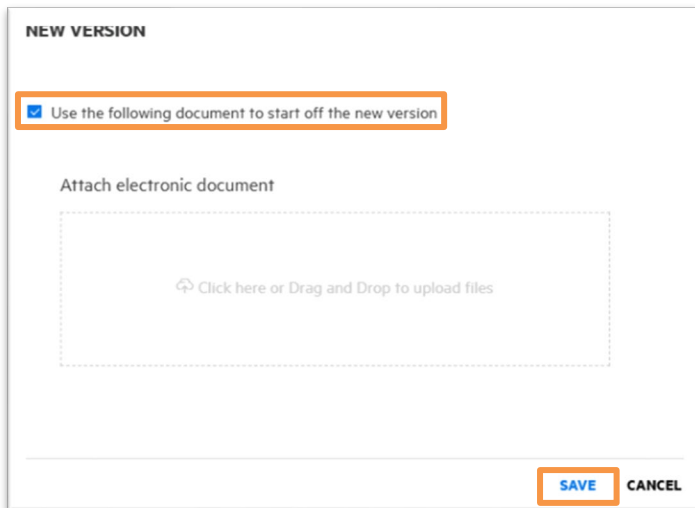
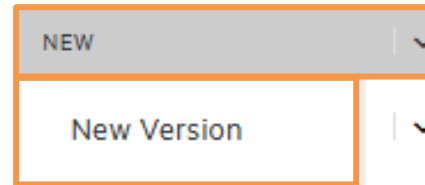
Should you need to create a new Version for a document:

1. Locate the document which you want to create a New Version for.
2. Tick the box next to the record or click on the record number once to display the options for the record such as ACTIONS, PROPERTIES, UPDATE etc. on the right-hand side of your screen:




3. Click on the **NEW** drop down, then select **New Version**.
4. The **NEW VERSION** popup window is displayed. Check the **Use the following document to start off the new version** checkbox to attach a document for this new version or uncheck the checkbox to continue with the existing document. Click **SAVE**.

**ACTIONS**    **PROPERTIES**




**Hint:** By default, the New Version will be created inside the same container as the Current Version.

5. The Previous Version of the document will be Finalised, and no further changes can be made to it. The Record Numbers will be the same, however they will have a suffix of [V1], [V2], [V3] and so on. You can amend the title of each of the Versions as required:

 ELECTRONIC DOCUMENT  
DOCX

D26/39[v1]    07 - Creating and working with Folders (Files)

 ELECTRONIC DOCUMENT  
DOCX

D26/39[v2]    07 - Creating and working with Folders (Files)