

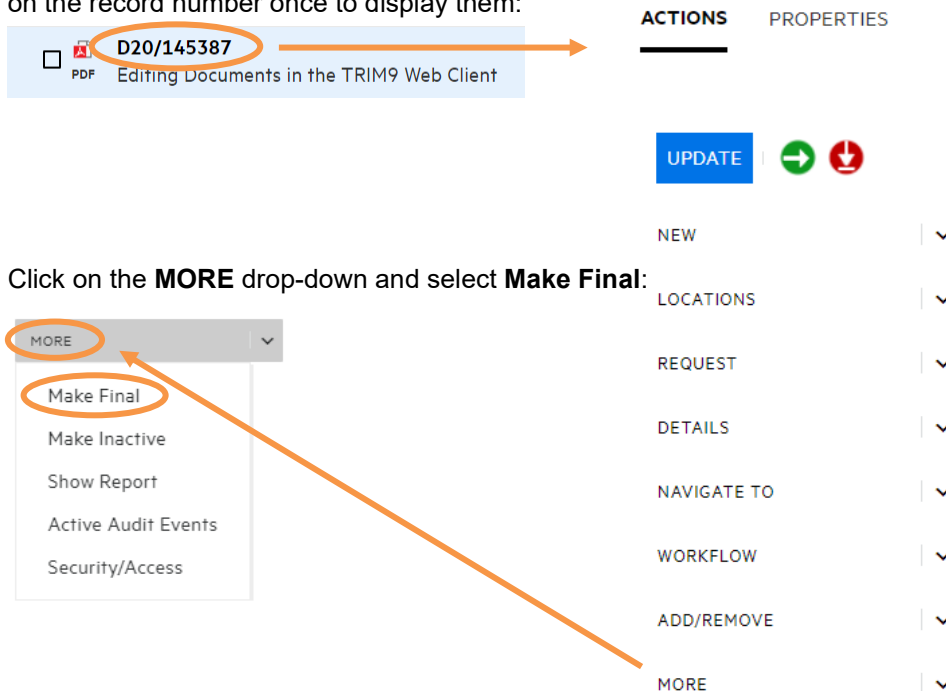
Finalising

Once a record has finished being edited/should no longer be edited in TRIM (e.g. a contract that has been signed by all approvers, an outgoing letter signed by the sender, endorsed meeting minutes etc.) and the final version captured in TRIM as the last revision, it is important to finalise the document in TRIM to prevent any unauthorised edits or changes to the record.

This applies not only to documents, but also other records such as spreadsheets, presentations, photos etc. where changes should no longer be made, and hence where that record should be made read only.

To finalise a record:

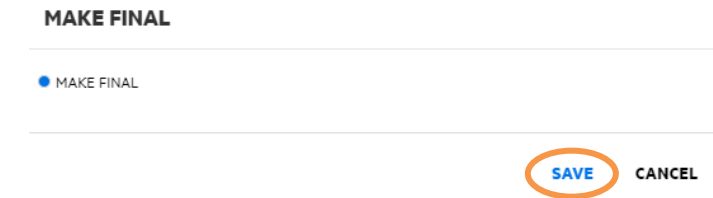
1. Ensure the options for the record such as ACTIONS, PROPERTIES, UPDATE etc. are displayed on the right-hand side of your screen. If not, click on the record number once to display them:



The screenshot shows a record titled 'D20/145387' with a 'PDF' icon and the text 'Editing Documents in the TRIM9 Web Client'. On the right side, there are tabs for 'ACTIONS' and 'PROPERTIES'. Below these tabs, there is a 'UPDATE' button, a green right arrow, and a red down arrow. A 'MORE' button is circled in orange, and an arrow points from it to the 'ACTIONS' tab. The 'ACTIONS' menu is open, showing options: 'Make Final' (circled in orange), 'Make Inactive', 'Show Report', 'Active Audit Events', and 'Security/Access'. Below the 'ACTIONS' menu, there is a list of options: 'NEW', 'LOCATIONS', 'REQUEST', 'DETAILS', 'NAVIGATE TO', 'WORKFLOW', 'ADD/REMOVE', and 'MORE', each with a downward arrow.

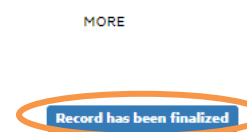
2. Click on the **MORE** drop-down and select **Make Final**:

3. The **'MAKE FINAL'** window will appear. Select **SAVE**:



The screenshot shows a window titled 'MAKE FINAL'. Below the title, there is a radio button selected next to the text 'MAKE FINAL'. At the bottom right of the window, there are two buttons: 'SAVE' (circled in orange) and 'CANCEL'.

The **'RECORD HAS BEEN FINALIZED'** pop-up shown below will display briefly on screen below the **UPDATE** and **NEW** buttons for the record you just finalised:



The screenshot shows a pop-up message that says 'Record has been finalized' in a blue box. Above the pop-up, the 'MORE' button is visible.

Hint: You can check at any time if a particular record is finalised by checking the **Properties** tab on the right of the TRIM Web Client screen, and checking the 'Edit Status' field to see if it states the record is 'Finalized':

Edit Status:
Finalized

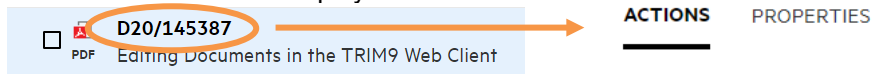
Reversing a Final Declaration

Most TRIM users can change the status of a record from finalised back into a draft/working document. This is to allow end users to quickly and easily un-finalise a record should it have been finalised prematurely/by accident.

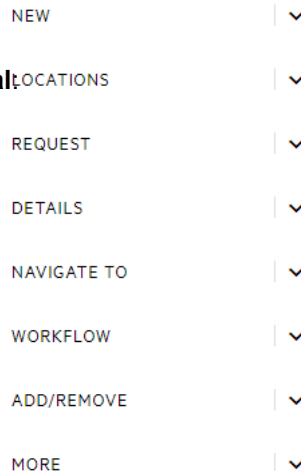
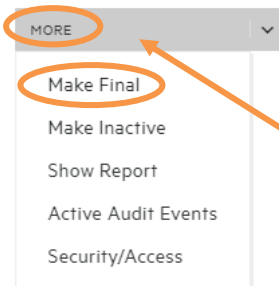
When deciding whether to un-finalise a record, TRIM users should exercise caution, and ensure that reversing the Final declaration is appropriate in the circumstance:

To reverse a Final declaration:

1. Ensure the options for the record such as ACTIONS, PROPERTIES, UPDATE etc. are displayed on the right-hand side of your screen. If not, click on the record number once to display them:



2. Click on the **MORE** drop-down and select **Make Final**:



3. The **'MAKE FINAL'** window will appear. Select **SAVE**:

MAKE FINAL

DRAFT/WORKING DOCUMENT



The **'DRAFT/WORKING DOCUMENT'** pop-up shown below will display briefly on screen below the **UPDATE** and **NEW** buttons for the record you just un-finalised:

MORE

