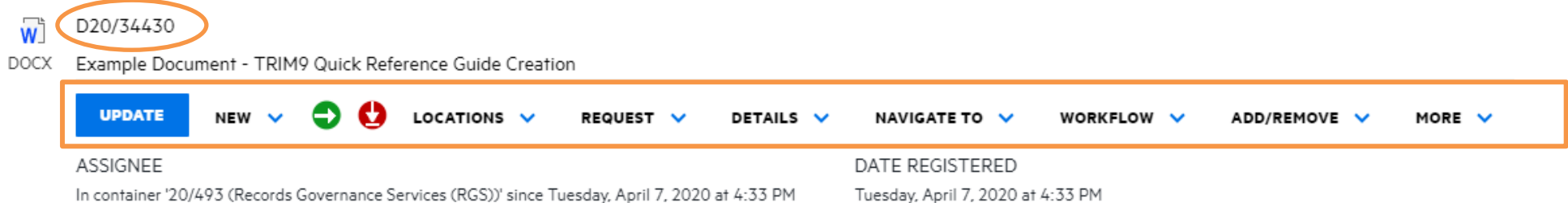## Finalising

Once a record has finished being edited/should no longer be edited in TRIM9 (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 TRIM9 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 UPDATE, NEW, LOCATIONS etc. are displayed. If not, click on the record number once to display them:

D20/34430

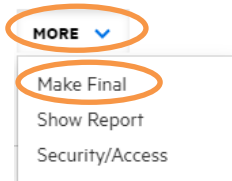DOCX   Example Document - TRIM9 Quick Reference Guide Creation

UPDATE   NEW ⌄   ➡ ⬇   LOCATIONS ⌄   REQUEST ⌄   DETAILS ⌄   NAVIGATE TO ⌄   WORKFLOW ⌄   ADD/REMOVE ⌄   MORE ⌄

ASSIGNEE   DATE REGISTERED
In container '20/493 (Records Governance Services (RGS))' since Tuesday, April 7, 2020 at 4:33 PM   Tuesday, April 7, 2020 at 4:33 PM

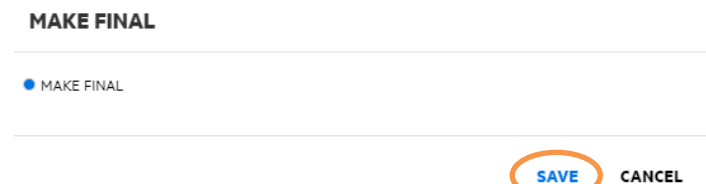2. Click on the **MORE** drop-down and select **Make Final**:

MORE ⌄

Make Final
Show Report
Security/Access

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

MAKE FINAL

● MAKE FINAL

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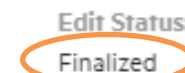
The **'RECORD HAS BEEN FINALIZED'** pop-up shown below will display briefly on screen below the **UPDATE** and **NEW** buttons for the record you just finalised:

UPDATE   NEW ⌄

RECORD HAS BEEN FINALIZED

> **Hint:** You can check at any time if a particular record is finalised 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 'Finalized':
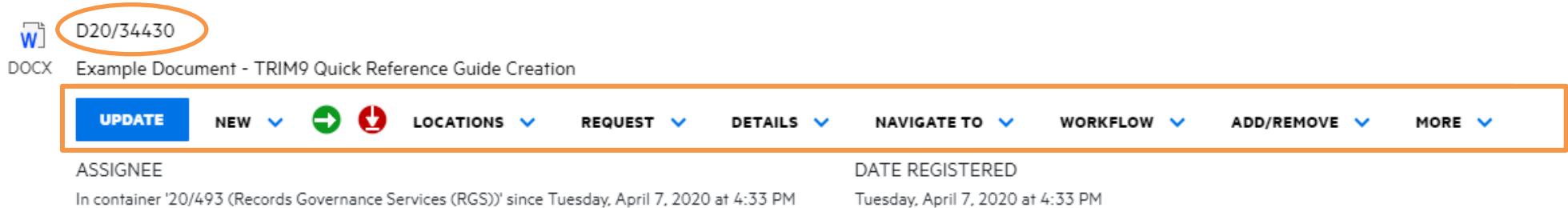>
> Edit Status:
> Finalized

Reversing a Final Declaration

Most TRIM9 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.
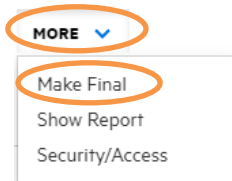
When deciding whether to un-finalise a record, TRIM9 users should exercise caution, and ensure that reversing the Final declaration is appropriate in the circumstance:

To reverse a Final declaration:

1. Ensure the options for the record such as UPDATE, NEW, LOCATIONS etc. are displayed. If not, click on the record number once to display them:

D20/34430

DOCX   Example Document - TRIM9 Quick Reference Guide Creation

UPDATE   NEW ⌄   →   ↧   LOCATIONS ⌄   REQUEST ⌄   DETAILS ⌄   NAVIGATE TO ⌄   WORKFLOW ⌄   ADD/REMOVE ⌄   MORE ⌄

ASSIGNEE

In container '20/493 (Records Governance Services (RGS))' since Tuesday, April 7, 2020 at 4:33 PM

DATE REGISTERED

Tuesday, April 7, 2020 at 4:33 PM

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

MORE ⌄

Make Final
Show Report
Security/Access

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

MAKE FINAL

● DRAFT/WORKING DOCUMENT

SAVE   CANCEL

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:

UPDATE   NEW ⌄

DRAFT/WORKING DOCUMENT