

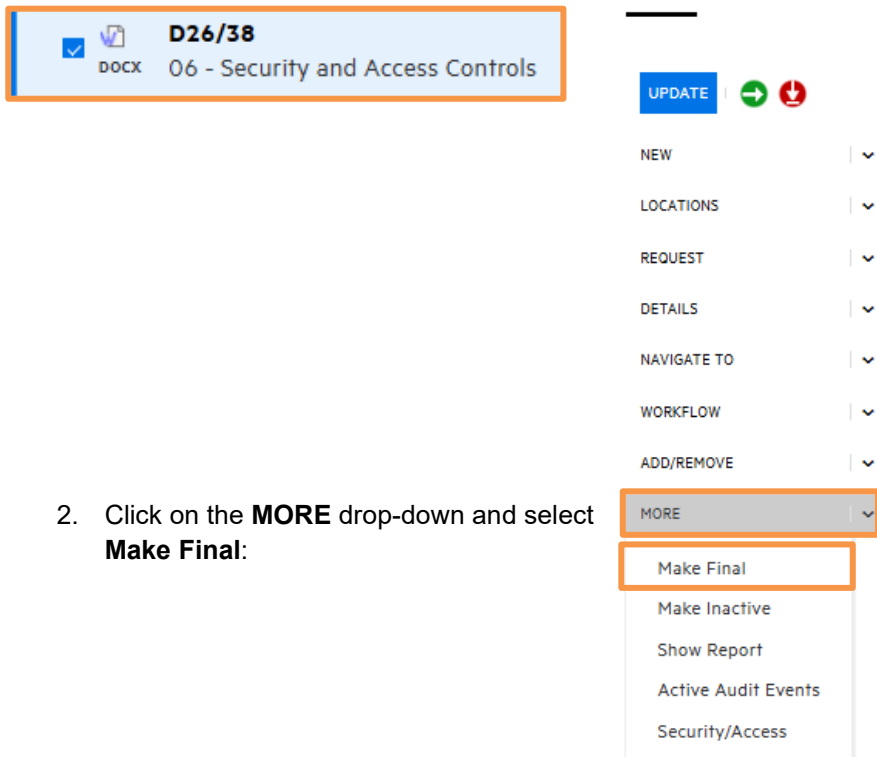
Finalising

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:

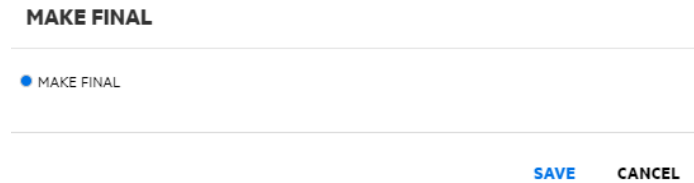
1. Tick the box next to the record or click on the record number once to display the options for the record such as ACTIONS, PROPERTIES, UPDATE etc. on the right-hand side of your screen:



The screenshot shows a record titled 'D26/38' with a sub-title '06 - Security and Access Controls'. The 'ACTIONS' menu is open, showing options like 'UPDATE', 'NEW', 'LOCATIONS', 'REQUEST', 'DETAILS', 'NAVIGATE TO', 'WORKFLOW', and 'ADD/REMOVE'. The 'MORE' option is highlighted, and its dropdown menu is open, showing options like 'Make Final', 'Make Inactive', 'Show Report', 'Active Audit Events', and 'Security/Access'.

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

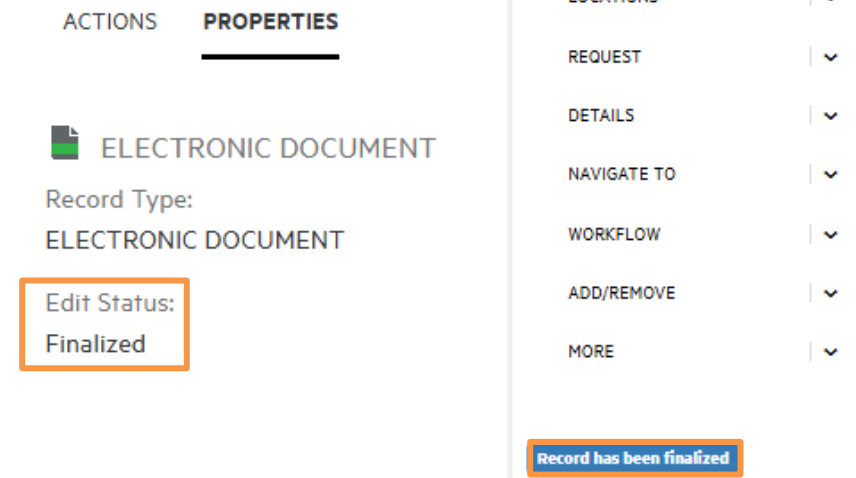
3. The **'MAKE FINAL'** window will appear. Select **SAVE**:



The 'MAKE FINAL' window is shown with a title bar 'MAKE FINAL'. Below the title bar, there is a single radio button option 'MAKE FINAL'. At the bottom of the window, there are 'SAVE' and 'CANCEL' buttons.

The **Record Has Been Finalized** pop-up shown below will display briefly on screen for the record you just finalised:

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'**:



The screenshot shows the 'PROPERTIES' tab for an 'ELECTRONIC DOCUMENT' record. The 'Edit Status' field is highlighted and shows 'Finalized'. A 'Record has been finalized' pop-up is visible at the bottom of the screen.

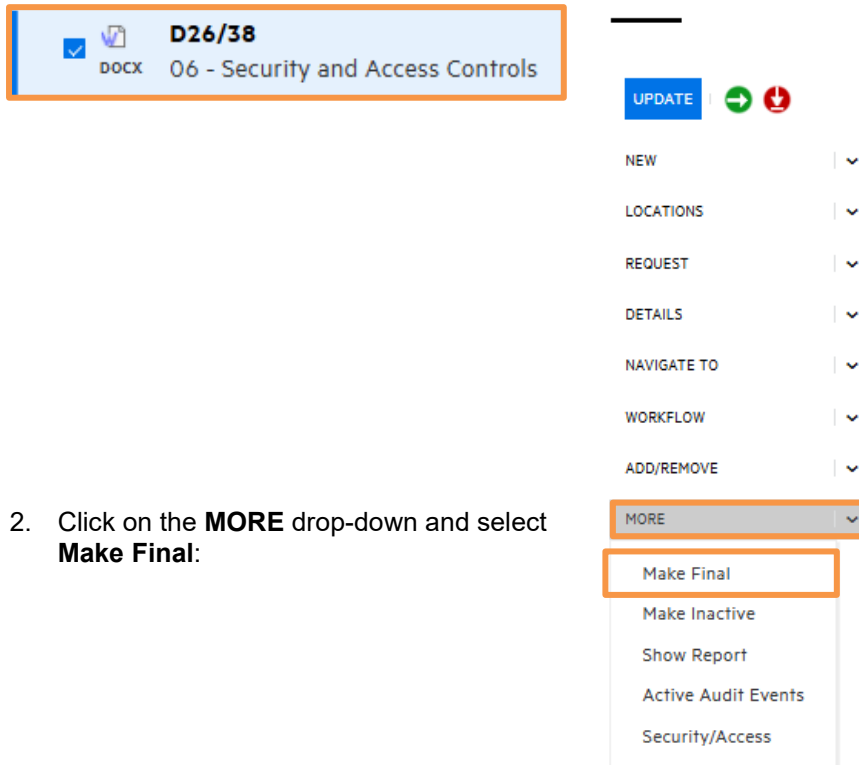
Reversing a Final Declaration

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:

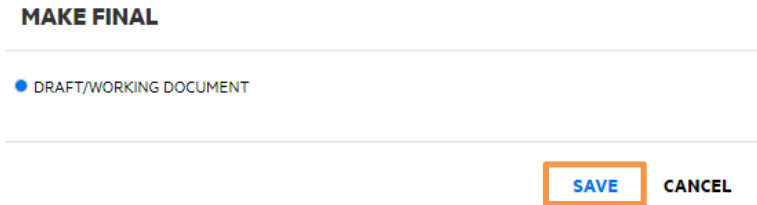
1. Tick the box next to the record or click on the record number once to display the options for the record such as ACTIONS, PROPERTIES, UPDATE etc. on the right-hand side of your screen:



The screenshot shows a record card for 'D26/38' with a checked box and a document icon. To the right, a sidebar contains a list of actions: UPDATE, NEW, LOCATIONS, REQUEST, DETAILS, NAVIGATE TO, WORKFLOW, and ADD/REMOVE. A 'MORE' dropdown menu is open, showing options: Make Final, Make Inactive, Show Report, Active Audit Events, and Security/Access. The 'Make Final' option is highlighted with an orange box.

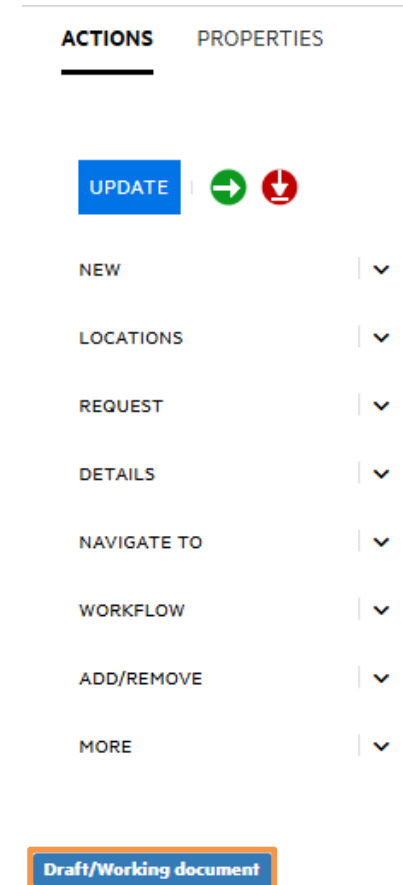
2. Click on the **MORE** drop-down and select **Make Final**:

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



The 'MAKE FINAL' window displays a radio button selection for 'DRAFT/WORKING DOCUMENT'. At the bottom right, there are two buttons: 'SAVE' (highlighted with an orange box) and 'CANCEL'.

The **Draft/Working Document** pop-up shown below will display briefly on screen for the record you just un-finalised:



The pop-up window shows the 'ACTIONS' tab selected. It contains a list of actions: UPDATE, NEW, LOCATIONS, REQUEST, DETAILS, NAVIGATE TO, WORKFLOW, ADD/REMOVE, and MORE. At the bottom, there is a blue button labeled 'Draft/Working document' (highlighted with an orange box).